

CHAPTER 4: STARTING THE BAR YEAR OFF RIGHT

Every year, young lawyer associations are faced with officer and director turnover. For some organizations, this is a simple matter because continuity exists between the officers from year to year. For other organizations, this event can be tumultuous and divisive. This paper seeks to provide suggestions to new or future bar leaders on how to plan for their upcoming ascension to young lawyer association president or chair.

A. Role of the President/Chair

The first steps in planning your year should occur well before you are ever elected or appointed to become President. You must learn what is expected of the President and make a determination of whether you can fulfill these expectations. If not, then you should not be President. You must also make sure your family and employer are supportive of your bar involvement.

Some possible roles of a President/Chair are (1) chair board meetings (2) appoint committee chairs (3) institute new public service and member service projects, (4) oversee executive director and staff, (5) financial oversight and budgeting, (6) communication with community, (7) represent organization at national and state meeting, (8) prepare awards and grant applications, (9) recruit new members, (10) monitoring committees, and (11) attending committee meetings.

B. Needs Assessment

The second step is planning for your year is to determine the needs of your organization and members. Although development of your goals for the organization is important, it is secondary to learning the needs of your organization. If you accomplish your own goals, but fail to meet the organization's needs, your year as President has not been a success.

The needs assessment review is often described as short range planning. The review should focus on items that can be accomplished within your bar year or at most within two years. Planning for three or more years is long range planning and is a separate topic.

Hopefully your organization has previously considered these issues and you will not have to recreate the wheel. If not, then make sure that the leaders coming after you are not placed in the same position you were. Create short range and long range planning committees to periodically look at planning issues and provide the results to your successor. Never limit the resources you use and make sure that a broad spectrum of members and leaders are asked for their opinion. At the same time, the core membership of the short range planning committee should not be so large that it becomes unruly and unproductive.

1. Members Services

There are many ways to ascertain the needs and desires of your members. For example, (1) formal member survey, (2) informal discussions with a broad range of members, (3)

discussions with present and former association leaders, (4) discussions with present and former committee chairs, (5) discussions with bar leaders of other similar organizations.

Some issues and needs to consider include:

a. What services or benefits do your members demand?

Do your members demand CLE opportunities, happy hours, an opportunity to meet with judges, discounted insurance or other services? Whatever their demands, your task in planning for the year is to determine what services must be obtained or maintained to keep your members happy. Your next task is to determine how to obtain and maintain them.

b. What services or benefits would your members like?

Another task is to determine what services or benefits your members would like to have. By being responsive to your members' desires, you will maintain your membership numbers and likely have more active members.

c. What services or benefits would make non-members join?

Often left out of a needs assessment analysis are non-members who are eligible to join the organization. This is a major mistake. One of the primary goals of any young lawyer organization is to increase its membership numbers and participation. Therefore, an attempt must be made to identify non-members who are willing to provide their opinions on what services or benefits would make them join and why they have not joined in the past. This may be a daunting task and may be better dealt with by a long range planning committee, but to the extent this issue can be included in the short range planning process it should be.

d. What services or benefits were successful in past years and what services or benefits should be altered or discontinued?

As part of the analysis of what your members and potential members want, you should also determine whether services and benefits your organization is currently providing are unnecessary or worthless. Do not hesitate to discontinue a service or benefit if it is no longer desired or needed. This is especially true if the money and resources expended on the services would be better spent elsewhere.

2. Public Service Projects

One of the primary goals of most young lawyer associations is providing services to the public. These programs can be costly, both in money and time. Therefore, it is important to periodically review your organization's public service projects to determine their effectiveness and the community and organization's interests in the projects. Too often an organization continues a public service project beyond its effectiveness simply because it has been done in the past. This is a major mistake that you should strive to correct.

a. What public service projects do your members want to perform?

Unless you are a genius that has everything figured out, you should ask your members what projects they would like to continue or implement. Your members will be the ones that cause the public service project to either fail or succeed. Therefore, it is extremely important to ensure that there is sufficient interest in the project to staff it with volunteers or to collect the necessary funds or donations.

Never let your own personal views of public service usurp the views and desires of the organization's members. If you disagree with the goals of a project that your members strongly believe in, do not undercut the project, simply assign it to someone who does believe in the project. The organization was there before you (usually) and will be there after you (hopefully). Therefore, do not let your own personal views on public service projects negatively affect your organization.

b. What public service projects are needed by your community?

Always inquire with the community to determine what new projects and services are needed. Numerous charitable organizations and organizations exist that can help you make this determination, such as, your local legal services agency, agencies on aging, charitable foundations and organizations, churches, schools, and governmental agencies designed to aid the poor, handicapped, and victims of crimes. Also inquire of sections of your senior bar, like the family law section, which may know of a need regarding services to children.

c. Which of these projects can your organization successfully implement?

After determining the need, the next step is to determine the feasibility of the project. No matter how needed, if your organization cannot accomplish the goals, the project should not be adopted by the organization. Various issues must be considered, including the number of volunteers that will be required, the financial requirements, and the liability of the organization and volunteers. Consider whether the organizations should do one major project or two or three smaller projects?

If your organization cannot accomplish the goals of the project on its own, consider joining with other organizations to implement the project or simply encouraging your members to volunteer for the project if it is implemented by another organization.

d. Which of these projects will most benefit the organization?

Often a decision must be made as to which public service projects should be continued or implemented. Every young lawyer organization has a finite supply of volunteers and money. Therefore, the projects that will most benefit your organization and the community should be selected for implementation. Benefits for the organization include member satisfaction, publicity, potentials for recruitment, recognition from the community and other law related

organizations, and the potential to have the project adopted by other young lawyer or bar associations.

One of the most difficult tasks for any bar organization is determining when an existing public service project should be replaced by a new project. There is no easy answer to this question. Often, existing projects have strong supporters in the organization who will be upset if the project is discontinued. Your task is to walk the fine line between balancing the interests of these members with the needs of the organization. It is always important when replacing a project that the decision is made by a committee and that the views of the interested members be considered and addressed.

3. Financial Assessment

A review of the financial resources of your organization should be performed each year. The financial resources of your organization will of course limit what you can accomplish during your bar year. The sooner you understand the financial limitations, the sooner you can realistically plan for your years.

The review should include consideration of (1) the funds on hand, (2) the normal expenditures each bar year, (3) the normal income revenues each year, (4) expected increases or decreases in expenses or revenues your bar year, (5) the need for fundraising or changes in dues, (6) reasonable expectations of fundraising, (7) the need for different investment strategies, (8) financial controls, and (9) reimbursement policies.

4. Organizational Issue

Despite our lawyerly instructions, many owners of small corporations do not follow the required corporate formalities. This failure often subjects them to personal liability. Amazingly, despite our advice to clients, young lawyers often ignore these same formalities with their young lawyer associations. This is of course a mistake. During your planning session, a review of the organization's articles and bylaws should be reviewed and any necessary changes should be formally made to them. You must also ensure that the corporate formalities are satisfied during your bar year. A related determination is whether liability insurance is needed for the organization or the directors and officers.

A review of the board structure (number of directors, officer positions) should also be performed. Consider whether the board is too small or too large and how it could be changed to be more effective. Part of this review should also include a review of the members' requirements and expectations of their board members. Consider preparing a written job description for board members.

5. Employees

If your organization is large enough, you may have an executive director or employees or be planning on hiring someone for such a position. Your annual review should consider whether an executive director is needed, the salary for the executive director (whether the salary is fair for

the performance and qualifications of the individual), the past performance of the individual, the job description of the position, employee policies (with an eye on legal matters), and the benefits provided to the employee.

6. Communication

A review of your organization's communication methods should be conducted periodically. The review should determine whether the leadership effectively communicates with the members and the public. Consider changes to your organization's newsletter and use of email.

C. Your Goals

After determining the needs of your organization, it is time to determine whether your goals are compatible. Whether your goal is to increase membership, start a new project to help children or to create a better relationship with the senior bar association, it must be acceptable to your board and members. Therefore, include others in the creation and planning of your goals.

D. Accomplishing your Goals

1. Planning

Before you ever take office, you should thoroughly plan your year. Through consultations with leaders and members of the organization, determine specifically what goals for member services, public services, and other areas you intend to accomplish. Prioritize these goals and brainstorm on what will be required to accomplish them. If you have multiple goals that cannot be accomplished at the same time, decide the order to which they will be implemented. Begin thinking of the individuals who you will appoint to help you accomplish your goals.

2. Develop a Calendar

Prepare a calendar for your year as soon as possible. Run the calendar by your executive director and board. Although you can always adjust the calendar, and in fact will have to as your committees begin selecting dates for events, preparing a calendar will help you determine if you are planning too many projects for one year.

3. Develop a Theme

If possible develop a theme for your bar year that can be shared with others. The theme should explain in a few simple words what you hope to accomplish and the focus of your bar year. Although your focus may be on public service projects, your theme should include your member service goals because the individuals who will most likely hear your theme are your members.

4. Communication

Effective communication is the most important tool for any leader. You must communicate your message to as broad a group of people as possible.

a. With members

This communication should begin a couple of months before you take office. (Always work with the existing president on this communication so that you do not conflict with his or her goals). Important goals of this early communication are to (1) explain the focus of your bar year in clear terms, (2) obtain buy in to your theme, (3) recruit new volunteers, (4) ensure your members do not leave the organization, (5) build enthusiasm, (6) request assistance, and (7) incite new ideas and suggestions.

Determine the best way to communicate your message to your members. If your organization does not have a newsletter, think of starting one. With existing software and today's printers, a high quality newsletter (color with pictures) can be created cheaply and with ease. Other ways to communicate are a simple web page, emails and presentations to your members in larger firms and at as many functions as you can attend.

b. With non-members and related organizations

Don't forget the community. Although the focus is on your members, communication with the public can generate new opportunities for your organization. Moreover, your hard working members can be rewarded with recognition in the local newspaper or on the local TV station. Consider visiting community organizations, such as charitable foundations and the junior chambers of commerce, to talk about your bar year and the needs of the community.

Plan to visit other bar and law related organizations, such as the senior bar, minority bar associations, specialty bar associations, and legal assistant associations, to inform them of your goals. Discuss how the organizations can work together to accomplish their individual goals.

5. Implementing New Projects

Implementing a new project can be one of the toughest tasks for a bar leader. Unless you have more time available than most, you will have to turn over your idea or new project to someone else. Therefore, one of the most important tasks is to find that special someone who will not let you down. In order to do this, start early. You should not wait until your bar year actually begins to make the important appointments. Rather, this appointment and the project planning should begin as soon as you have decided on a new project.

Your second task is to remain involved while not interfering with your project leader's efforts. Although the project may be your baby, you have to be willing to step back and let others develop the project.

6. Committee and Project Chairs.

a. Selecting Committee and Project Chairs

This activity should occur throughout the year before you become President. The first step is to identify the committee chairs that have been successful so that they can be reappointed. The second step is to identify the committee chairs that have not been successful so that a determination can be made whether they might be successful leading a different committee or whether they simply should not be reappointed as a committee chair. The third step is to identify new members who should be appointed to chair a committee for the first time.

Remember these are the individuals that will determine whether your year as President is a success or a failure. Make sure that the right people are placed where they need to be. If an appointment is not working out, do not be afraid of change. If you plan on implementing a new project, do not be afraid to select a project chair the year before you become president so that the project can be implemented at the start of your bar year.

b. Orientation

At least one meeting should be held for all committee chairs. At the meeting a committee chair manual should be distributed and discussed. The manual should contain the expectations of a committee chair, a calendar of events, a description of every committee, and contact information for the organization's officers and directors. This may be your only opportunity to meet with the committee chairs all at once, so make the most of it. Each committee should be required to develop a plan of action for the year and to submit quarterly reports regarding their accomplishment of the plan.

c. Follow-Up

You should attend as many committee meetings as possible and periodically communicate with the committee chairs so that the committee members know that they have the support of the organizations and so that you can make sure the goals set for the committee are being accomplished. Don't be stingy with your praise.

7. Work with law student, minority and specialty bars, and law related organizations.

Do not forget these valuable resources when planning your year. They can provide excellent publicity and additional volunteers. Develop a relationship with your counterpart in these organizations as soon as possible.

E. Working with your Board

Although it should go without saying, don't forget your board. You cannot do it alone and the board should be your biggest fan. Most of your earliest effort should be spent winning over the board. Failure will be almost assured if you treat the board as though they have to

support you. Be sure to include the board in planning sessions and discuss (and incorporate if possible) the goals of the board members.

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