

MBA
LEADERSHIP
FORUM

DIVERSITY • PROFESSIONALISM • SERVICE



WHAT IS THE LEADERSHIP FORUM?

The Mission of the Memphis Bar Association Leadership Forum is to:

- Develop the leadership skills of attorneys in their early years of practice;
- Empower those attorneys to use their leadership skills to make greater contributions to the Memphis community and the legal profession;
- Model and practice the highest standards of the legal profession; and
- Encourage diversity in the practice of law and the building of relationships among attorneys of diverse backgrounds.

HOW DOES THE LEADERSHIP FORUM WORK?

The Leadership Forum begins with a full-day retreat on Saturday, September 16, 2006 at which leadership concepts will be introduced and participants will get to know one another. Monthly sessions from October through April will explore such topics as

- Communication Skills
- Negotiation
- Attorneys' Role in the Community
- Balancing Work and Life
- Public Trust & Confidence in the Judicial System

Sessions are scheduled from noon until 4:00 p.m. and lunch is provided. Participants are required to attend the retreat and miss no more than two of the monthly sessions. The Forum concludes with a graduation ceremony in May.

The monthly sessions are held at various locations around the city, to acquaint participants with the services and programs offered by community organizations. Representatives of these organizations are invited to make a brief presentation and give tours of the facility. Some of the visited facilities include MIFA, the Benjamin Hooks Central Library, the National Civil Rights Museum, and Bridges, Inc.

In addition, participants are divided into smaller groups, which are each assigned a mentor. Each small group is charged with developing and implementing a community service project during the Forum.

WHO IS ELIGIBLE?

Any Memphis Bar Association member who will be in his/her third to eighth year of practice during the Forum may apply. The Steering Committee will review applications and select the participants by July 7, 2006. Class size is limited to 25. Participants will be selected to insure diversity in terms of practice area, type of practice, size of firm, law school attended, race, and gender.

WHAT IS THE COST?

Tuition is \$550, which covers 25 hours of CLE credit, lunches, and printed materials. A limited number of scholarships are available. Contact Anne Fritz at the MBA (afritz@memphisbar.org) to receive a scholarship application.

HOW DO I APPLY?

Complete and submit the application package by 5:00 p.m. on June 2, 2006. The Steering Committee will review applications and notify participants no later than July 7, 2006.

Applications may be submitted by MAIL to Anne Fritz, Executive Director; Memphis Bar Association; One Commerce Square, Suite 1050; Memphis, TN 38103; by FAX, (901) 527-3582; or by EMAIL to afritz@memphisbar.org.

The Memphis Bar Association would like to extend a Special Thanks to the 2006-2007 Leadership Forum Steering Committee:

Susan Clark, chair

G. Patrick Arnoult

Craig Conley

Katrina Earley

Lisa Krupicka

Melisa Manns

Scott Peatross

Kathy Story

Judge Diane Vescovo

EDUCATION

Please provide the following information for all undergraduate, graduate and law schools.

University/College	Degree	Graduation Date	Major

Please list any significant awards or honors for either academic or extracurricular activities during undergraduate, graduate and law school.

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VOLUNTEER/COMMUNITY/BAR ACTIVITIES

Please list any other volunteer, community or bar association activities in which you are or have been involved during the last eight years.

Organization (including Location)	Describe Activity or Positions Held	Dates of Involvement



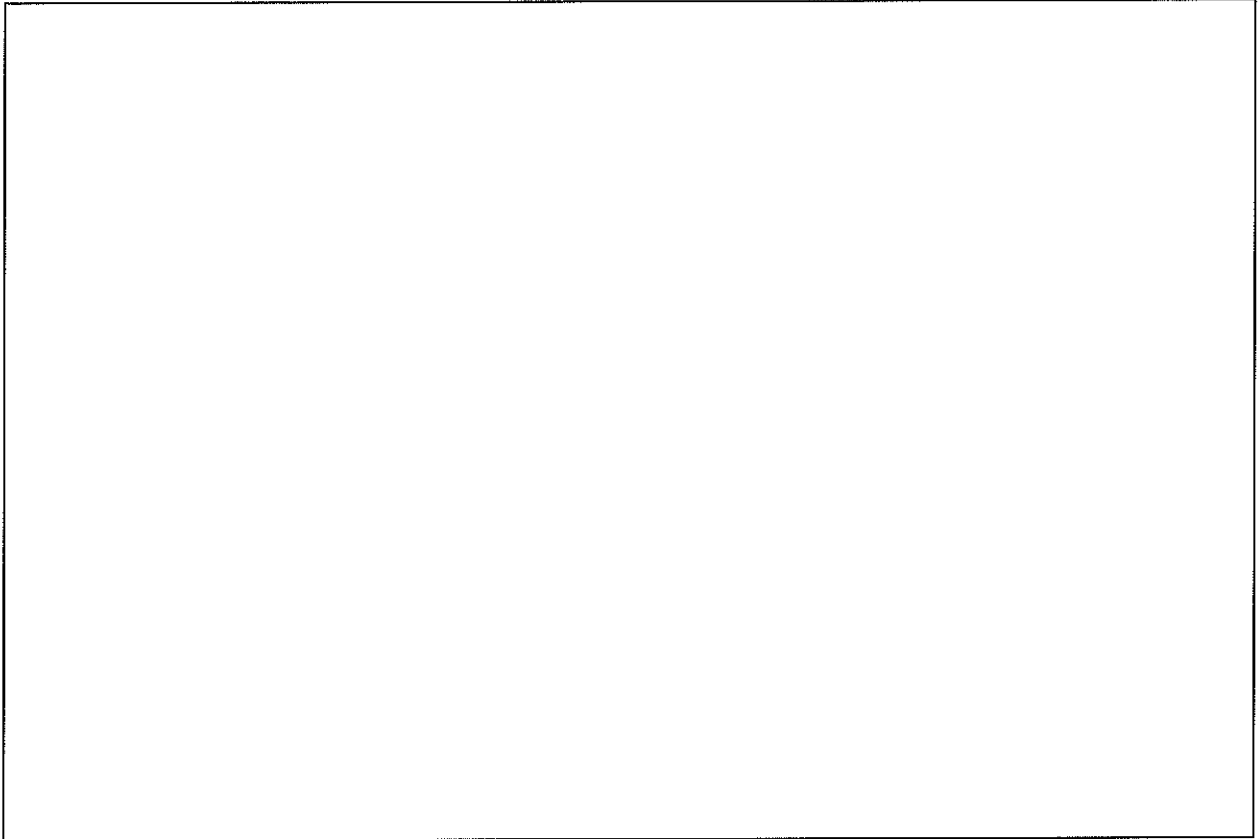
VOLUNTEER/COMMUNITY/BAR ACTIVITIES (continued)

Select up to three volunteer, community, or bar activities that have been most significant to you, and describe, in less than 150 words per activity, the dates of your involvement and the reasons that activity has been meaningful, especially as it relates to your leadership experience.

A large, empty rectangular box with a thin black border, intended for the user to write their responses to the prompt above.

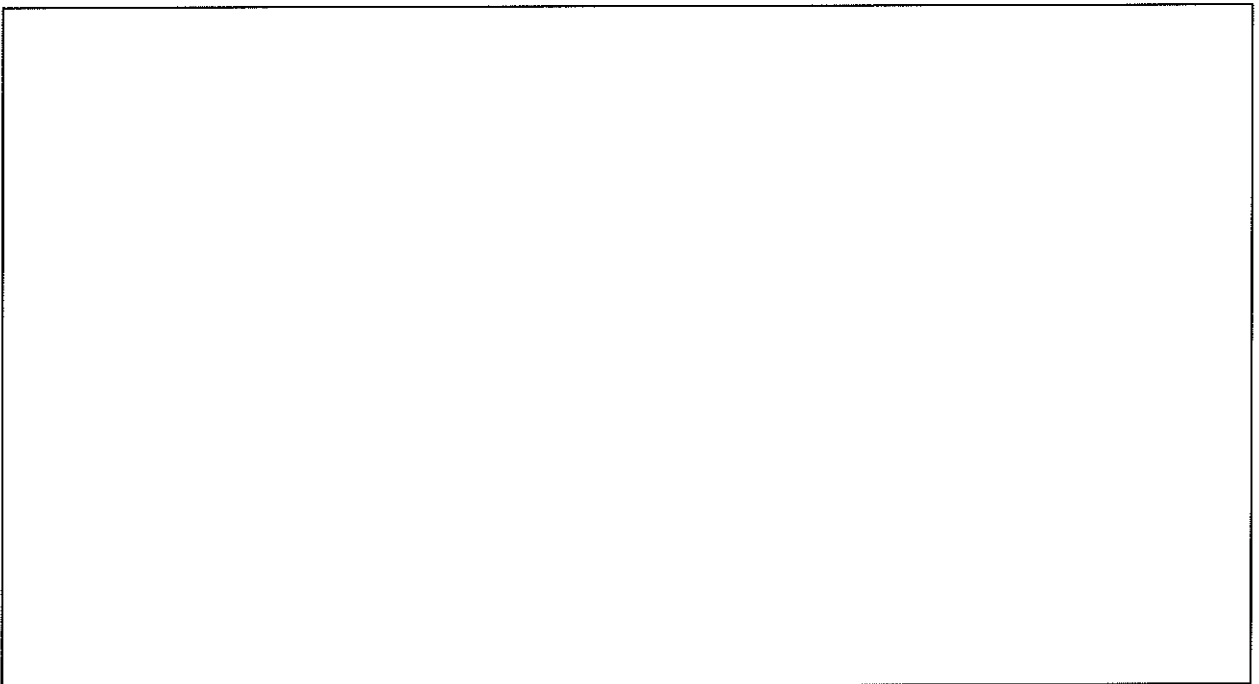
MISCELLANEOUS

List any other activities, leadership positions, honors or awards that you desire to bring to the attention of the Selection Committee:



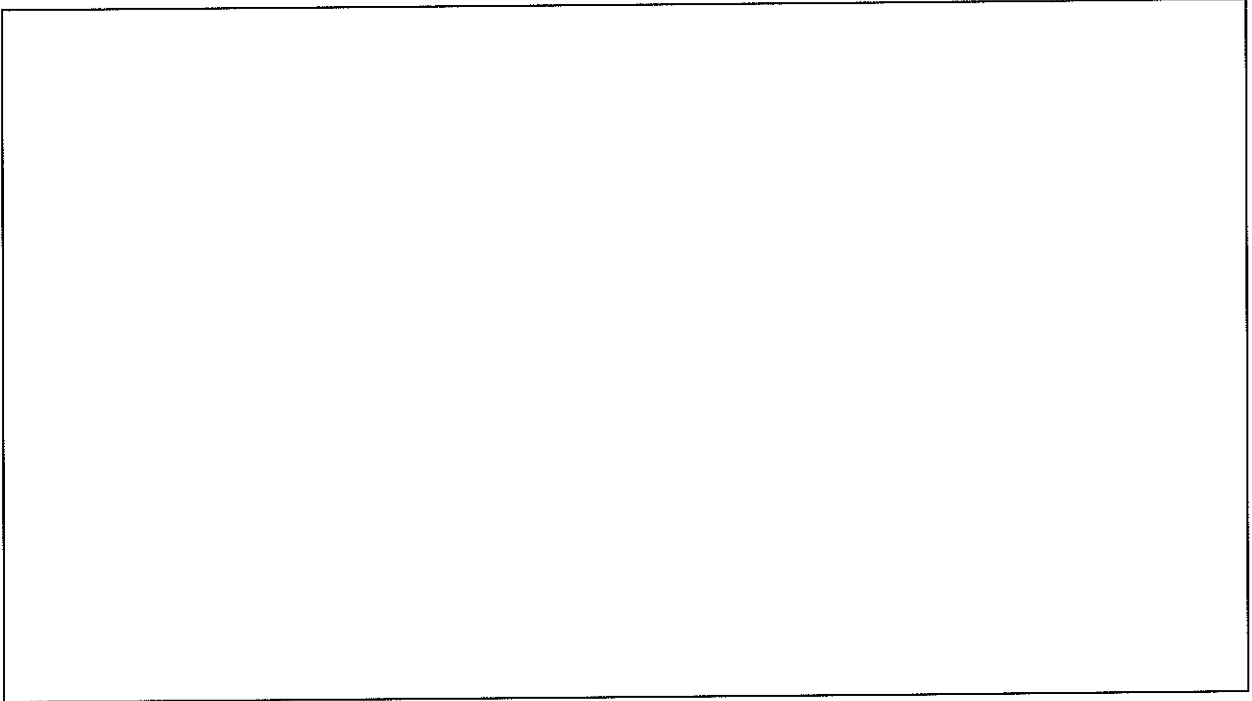
PARTICIPATION INFORMATION

Explain why you desire to participate in the Leadership Forum.

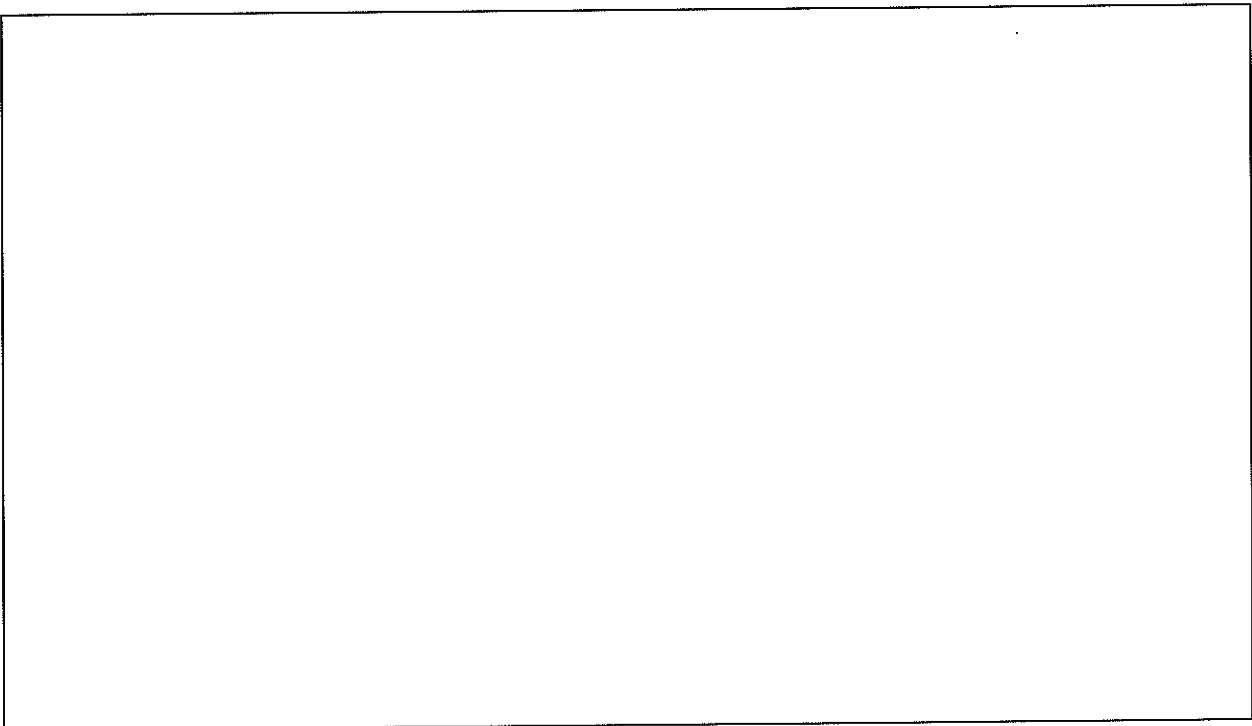


PARTICIPATION INFORMATION (continued)

Explain how you can contribute to the Leadership Forum.



Describe the three qualities that you believe are most important for leadership positions in bar and/or community organizations.



APPLICATION AGREEMENT



I hereby apply to the Memphis Bar Association Leadership Forum and understand that in order to graduate from the Leadership Forum I must attend the mandatory retreat on Saturday, September 16, 2006; miss no more than two of the seven monthly programs; and dedicate the additional time necessary to fully participate in a successful group service project.

Signature _____

Date _____

We understand the time commitment necessary for the above applicant to participate in the Leadership Forum and support the applicant's acceptance into the program.

Name of Applicant's Firm/Employer _____

Signature _____

Date _____

**LEADERSHIP FORUM
2006-2007**

PROGRAM SCHEDULE

- Wed., Oct. 18, 2006 Making a Difference
National Civil Rights Museum
Speaker: Mike Cody
- Wed., Nov. 15, 2006 Public Trust & Confidence in the Legal System
Speakers: Heidi Verbeek, Executive Director of the Crime
Victims Center, and Hon. Jon P. McCalla
- Wed., Dec. 6, 2006 Attorney's Role in the Larger Community
Youth Villages Bartlett Campus
Speakers: Harrison McIver, Patrick Lawler, and John Malmo
- Thurs., Jan. 4, 2007 Communication Skills
Michael Rose Theater
Speaker: Dr. Katherine Hendrix, Associate Professor,
Department of Communication, University of Memphis
- February 13, 2007 Conflict Resolution
Bridges, Inc.
Speakers: Allie Prescott, Magistrate Judge Diane Vesçovo
- March 22, 2007 Balancing Work & Life
Hope & Healing Center
Speakers: Ann Langston, Church Health Center; Kathy
Story
- April 17, 2007 The Future of Memphis
Shelby Farms Visitor Center
Speakers: Dean Deyo, Memphis Music Foundation; Laura
Adams, Shelby Farms Alliance
- May 23, 2007 Graduation Ceremony
Speaker: Arnold Perl, Ford & Harrison

Monthly sessions begin at noon with lunch and last until 4:00 p.m.

**LEADERSHIP FORUM
2005-2006**

PROGRAM SCHEDULE

- | | |
|---|---|
| Wed., Sept. 14, 2005 | Reception/dinner
Center for Southern Folklore |
| Sat., Sept. 17, 2005
8:30 a.m.-5:00 p.m. | Retreat at Lichterman Nature Center |
| Wed., Oct. 12, 2005 | Making a Difference
National Civil Rights Museum
Speaker: Mike Cody |
| Tues., Nov. 15, 2005 | Public Trust & Confidence in the Legal System
Central Library
Speakers: Magistrate Judge Tu Pham and
Jef Feibelman |
| Thurs., Dec. 15, 2005 | Attorney's Role in the Larger Community
MIFA
Speakers: Judge Diane Vescovo
Harrison McIver
Judge George Brown |
| Thurs., Jan. 12, 2006 | Communication Skills
Michael Rose Theater
Speakers: Katherine Hendrix (U of M professor) |
| Tues., Feb. 14, 2006 | Conflict Resolution
Bridges, Inc.
Speakers: Susan Clark, Allen Blair, and Kaywin Feldman |
| Tues., March 14, 2006 | Balancing Work & Life
Hope & Healing Center
Speakers: Danese Blankenship, Wendy Dabbous, Jennifer
Hagerman, and Bruce McMullen |
| Tues., April 11, 2006 | Future of Law Practice
The Data Co.
Speakers: Maureen Holland, Greg Siskind, and Charles
Tuggle |
| Tues., May 23, 2006 | Graduation Ceremony
Speaker: Mayor A C Wharton |

Program Format

12:00-12:30 p.m.

12:30-1:00 p.m.

1:00-3:30 p.m.

3:30-4:00 p.m.

Lunch and presentation by representative of organization

Tour of facility

Program

Reflection/Discussion

**MEMPHIS BAR ASSOCIATION
LEADERSHIP FORUM**

SCHEDULE

- September 10-11, 2004
Begins at 1:30 p.m. on Friday;
Concludes at 4:00 p.m. on Saturday
Retreat at Whispering Woods Conference Center
11200 E. Goodman Road, Olive Branch, MS
- October 13, 2004
12:00-4:00 p.m.
The History of Memphis Lawyers
Location: National Civil Rights Museum
Speakers:
W.J. Michael Cody, Burch Porter & Johnson
Hon. D'Army Bailey, Circuit Court, Division VIII
Hon. Robert Lanier, Circuit Court (retired)
- November 12, 2004
12:00-4:00 p.m.
Public Trust & Confidence in the Judicial System
Location: Memphis & Shelby County Public Library
Speaker:
Hon. Bernice B. Donald, U.S. District Court
- December 7, 2004
12:00-4:00 p.m.
The Attorney's Role in the Larger Community
Location: MIFA
Speakers:
Hon. Diane Vescovo, U.S. Magistrate Judge
Hon. George H. Brown, Jr., Circuit Court
Harrison McIver, Executive Director, Memphis Area
Legal Services
Barbara Zoccola, U.S. Attorney's Office
- January 11, 2005
12:00-4:00 p.m.
Communication Skills
Location: Michael Rose Theatre
Speakers:
Hon. Robert L. Childers, Circuit Court
Joe Birch, WMC-TV 5
Antoinette Cheney, Howell-McQuain Strategies
- February 1, 2005
12:00-4:00 p.m.
Negotiation Skills
Location: Memphis Brooks Museum of Art
Speakers:
Allen Blair, Harris Shelton Hanover Walsh
David Wade, Martin Tate Morrow & Marston
- March 1, 2005
12:00-4:00 p.m.
Inner Workings of Government
Location: County Commission Chambers
Speakers:
Hon. A C Wharton, Mayor of Shelby County
David Lillard, Esq., Shelby County Commission
Carol Chumney, Esq., Memphis City Council

April 7, 2005
12:00-4:00 p.m.

Balancing Work & Life
Location: Hope & Healing Center
Speakers:
Hon. Janice M. Holder, Tennessee Supreme Court
John McQuiston, Stokes Bartholomew Evans & Petree
Dorothy Pounders, Pounders Coleman

May 12, 2005
12:00-1:30 p.m.

Graduation Ceremony
Racquet Club
Speaker:
Hon. Julia S. Gibbons, 6th Circuit Court of Appeals

May 5, 2006

Dear Managing Partner:

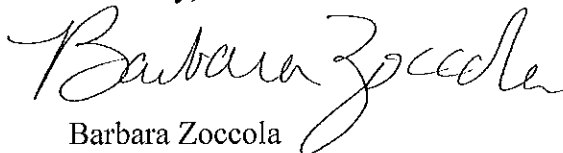
In its first two years of existence, the **Memphis Bar Association Leadership Forum** has been a remarkable experience for the nearly 50 young attorneys who have participated. These attorneys have learned about leadership, the legal profession, and our community. They have forged new relationships with their peers as well as with current leaders in government, law, education, and public service.

I encourage you to nominate and sponsor a lawyer in your office for inclusion in the 2006-2007 Leadership Forum. Information about the program and an application are enclosed and are also available on our website, www.memphisbar.org. Lawyers who have been practicing for three to eight years and who demonstrate leadership potential and an interest in community involvement are eligible. We ask that you keep one of the Forum's main goals – diversity – in mind as you consider young attorneys to nominate.

The Leadership Forum prepares participants to be leaders in their law firm, corporate or government legal department, in the broader legal community, and in our city. The Forum also promotes professionalism, as evidenced by its recent selection to receive one of the E. Smythe Gambrell Professionalism Awards, presented by the ABA Standing Committee on Professionalism.

I hope you will take advantage of this opportunity to include one of your lawyers in the program. If you have any questions, please call Executive Director Anne Fritz at 527-3573 or email her at afritz@memphisbar.org.

Sincerely,

A handwritten signature in cursive script that reads "Barbara Zoccola". The signature is written in black ink and is positioned above the printed name and title.

Barbara Zoccola
President

September 9, 2005

Dear _____:

Thank you for agreeing to be a mentor for the second class of the MBA Leadership Forum. The themes of diversity, professionalism, and service guide the program to provide high quality, relevant, and engaging experiences to develop lawyers with three to eight years experience for leadership roles in the bar, the legal profession, and the greater community.

Your role as a mentor is key to the success of our program. In addition to providing guidance and assistance in your group's selection, planning, and execution of their service project, we hope you will find time to be with your group to talk about our profession and our community. From experience, we know that our participants value the relationship with their mentor and want to hear the personal stories that only experienced lawyers and leaders can share:

- How did you find the right niche within your vocation for the greatest use of your skills, personal attributes, and interests?
- How did you balance work and personal life at the beginning of your career, and is that balance different now?
- What motivated you to become involved in bar association work? What has been most rewarding about that involvement?
- How did you become a recognized leader in the profession and community? Did you plan your path or were you just in the right place at the right time?
- Who are your own mentors, personally and professionally? Did you choose them or did they choose you?
- What are you reading now that is speaking to you?
- What experiences or persons formed your ideas about attorneys' responsibilities for pro bono work and service to the community at large?

September 9, 2005

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We hope you will attend as many monthly Leadership Forum seminars as your schedule allows. A schedule of those seminars, with dates, locations and topics, will be sent to you next week, along with a list of those in your small group.

We do ask that you meet once a month with your group, either to work on the community service project or to have informal discussions, and to stay in touch with them regularly by email or telephone. You might invite them to join you at an MBA or community event, offer your firm's conference room for a brown bag lunch, or meet them at a favorite spot after work for coffee or cocktails. The MBA conference room is also available to you and the MBA staff is happy to set up an email list for your group or provide other help.

Please let us know how we can be of assistance as you work with your group during the nine months of the Leadership Forum. We hope that this experience will be as rewarding for you as it is for each of the participants.

Sincerely,

Anne Fritz,
Executive Director

Kathy Story,
Leadership Forum Consultant

MBA LEADERSHIP FORUM

September 2004-May 2005

Program Evaluation

Please indicate how well each statement describes your reaction to the entire Leadership Forum experience by using the following scale. Circle the appropriate response.

1-----2-----3-----4-----5-----6-----7
Disagree **Disagree** **Disagree** **Neutral** **Agree** **Agree** **Agree**
Strongly **Slightly** **Slightly** **Strongly**

Overall program aspects:

- | | | |
|----|---|-----|
| a. | I gained a deeper understanding of leadership and professionalism. | 6.1 |
| b. | I acquired new skills and knowledge that will be useful in my work. | 5.6 |
| c. | The presenters demonstrated expertise about their topics. | 6.4 |
| d. | The presenters were well prepared and their materials were well organized. | 6.1 |
| e. | The presenters demonstrated enthusiasm and interest in teaching. | 6.5 |
| f. | The presenters encouraged and were receptive to questions. | 6.5 |
| g. | Communication about Leadership Forum events was timely and helpful. | 6.3 |
| h. | The retreat notebooks and monthly materials were beneficial. | 5.8 |
| i. | The full group discussions were beneficial. | 6.3 |
| j. | Changing the location for each monthly seminar served as an effective way to learn about the community. | 6.6 |

Please indicate how well each statement describes your reaction to your small group experience by using the following scale. Circle the appropriate response.

1-----2-----3-----4-----5-----6-----7
Disagree **Disagree** **Disagree** **Neutral** **Agree** **Agree** **Agree**
Strongly **Slightly** **Slightly** **Strongly**

Small group experience:

- | | | |
|----|--|-----|
| a. | Though my group's project, I gained a deeper understanding of the implication of leadership and professionalism for community service. | 5.6 |
| b. | Through the group project, I acquired new skills and knowledge. | 4.6 |
| d. | My small group worked together well. | 5.9 |
| e. | My mentor demonstrated enthusiasm and interest in my group's project. | 5.4 |
| f. | My mentor devoted sufficient time and energy to my group. | 5.5 |

Comments:

The best thing about my small group was getting to know each other better through the few lunches we shared. But we did not participate equally in our project.

I already do a lot of public service work, so this portion was kind of like preaching to the choir.

The original project we planned was cancelled when the administrator from the Memphis City Schools stopped returning our phone calls. We had to invent a new project, which was not as ambitious as the first, because we had little time to first a replacement. Also, our mentor was not very interested or involved.

What are the three most important things you are taking away from your leadership Forum Experience?

Understanding of how I learn from the Kathy Story personality test.

Good networking with attorneys who I normally would not meet in my practice.

How important it is to get involved in the community.

How easy it is to get involved in the community.

How much impact one person can make.

The Forum taught us tips on deal with press inquiries. We had a whole session on press relations. We even learned what colors to wear when being interviewed on television.

In addition to providing practical tips on leadership, the Forum inspired us to lead by teaching us the history of prior generations of Memphis lawyers who have effected positive change through their leadership.

The most personally meaningful think I took away from my participation in the Leadership Forum was a new group of friends.

The Leadership Forum helped encourage me to pursue leadership roles and taught me practical leadership skills that make me more effective in these roles. For instance, we had a session on negotiation that taught use sophisticated techniques to amicably resolve disputes.

An appreciation of the history and legacy of the Memphis Bar.

The relationships developed with fellow participants.

A greater appreciation for the Bar Association.

A newly developed motivation to be more active in certain community activities such as MALS [Memphis Area Legal Services].

Forming lasting relationships with a great group of young leaders.

Ideas on how to be a better and more effective leader.

Greater camaraderie with fellow "classmates."

Greater understanding and appreciation of the Memphis legal community.

Better personal skills in areas covered by monthly sessions (e.g., communication and leadership skills, balance in work vs. personal life.)

New friends and contacts in my field.

A reminder how important follow-up and follow-through is to clients.

A reminder that what lawyers do and how they do it really does make a difference in the community.

Meeting other attorneys in the community that I would not have met otherwise.

Broader perspective of careers related to law.

Information about the Memphis community with a specific focus on how law relates to the community at large.

What are three things you will do as a result of having participated in the Leadership Forum?

Try to become more involved in leadership positions outside of the Bar Association.

Seek out opportunities to get involved in the community.

Recommend to impressive young lawyers to apply to the Leadership Forum.

Have lasting friendships with many of my co-participants.

More participation in pro bono.

Seek out more active ways to lead in the community.

See out more active role in the Bar Association.

Participate and be more active in community activities other than my job.

Encourage other young lawyers to participate in the Forum.

Refine leadership skills as taught by the presenters and apply them more in my professional activities.

Follow-up with clients as soon as possible.

Stay aware of current events in the community.

Look for opportunities to get to know other members of the bar better.

Be more active in the bar association (Memphis and Tennessee).

Continue to participate in volunteer activities but look for some that include law related activities.

Recommend the program to others.

How has this experience contributed to your understanding of yourself as a learner, as a lawyer, and as a leader?

I have a better understanding of my learning style. Also, listening to the various leaders that spoke to us gave me the opportunity to see which style best suits me.

It has contributed greatly. I realize and appreciate that the best learners, leaders and lawyers can "go around the circle" very quickly and easily.

That I need to step back more often and take an introspective look at who I am and where I'm headed, and whether that comports with where I want to go.

It really showed me that the leaders in our community find the time to participate in all aspects of community service despite being pulled in so many directions. Before, I felt that I was too busy to participate—but if the leaders we spoke with aren't too busy, then surely I can make the time to contribute.

It's helped me realize that I need to put more emphasis on taking action in all phases of my life because I tend to overanalyze things and am slower to move on them than I should be.

Helped me understand why I like dealing with problems and situations in a particular way.

How has this experience contributed to your interest in the quality of justice for future generations?

It made me want to improve the image of the justice system and attorneys so the law will be revered and not ridiculed.

It has reinforced the importance of it.

Our group project was "hands on," which was very rewarding. It really confirmed for me that even a small group of lawyers can make a difference.

Prior to the Leadership Forum, I was already concerned about the quality of justice for future generations. My participation in the Forum, however, did not really give us any ideas as to what we can do to improve the quality of justice for future generations.

My small group projects really opened my eyes to the need for more and more effective communication with litigants.

It has been a good reminder about the need to participate as a community leader and as a professional that can make a difference in the quality of legal service provided to the public.

Specifically, how have you integrated what you have learned through the Leadership Forum in your work and life?

Better listening, more appreciation for community service and quality of life.

I make sure to go around the circle each time I begin a new task.

I'm tried to be more pro-active in taking on community service projects. Specifically, I recently agreed to serve on the Board of the Shelby County Schools Education Foundation.

I have actually already begun greater involvement in MALS [Memphis Area Legal Services], which was spurred by my Leadership Forum experience.

I'm a more conscientious attorney and make more of an effort to get to know counsel on the cases on which I work.

Take into consideration different learning styles and incorporate that into communication with clients, other attorneys, judges.

What suggestions do you have for improving next year's programs?

I think it was a great program. I don't know what could be done to make it better.

The small group project concept needs improvement. First, we had to pick our project in a two hour breakout session at the retreat, and then we were committed to it. With all the other time commitments for the Forum, working too much on the project was very difficult.

Cut the amount of time spent on the personality profile. It took too long.

I liked the program as is.

If a participant is going to be chosen for the forum, they should have to attend a minimum number of the events to graduate.

Maybe include a workshop for one or two session (media relations, mediation/ADR) where the participants practice the practical aspects of the seminar.

Mid-week sessions could average an hour shorter and perhaps fall on Friday afternoons.

Perhaps a program on rookie mistakes in courtroom appearances—dress, addressing judges, etc.—at the end of the session re: communications; we just starting chatting about our various experiences and it was a great discussion.

More interaction with the place at the program, like we did at the Civil Rights Museum.

Thank you very much for your feedback. Please return this form by August 1, 2005, to Anne Fritz, Memphis Bar Association, One Commerce Square, #1050, Memphis, TN 38103; fax 527-3582; email afritz@memphisbar.org.

LEADERSHIP FORUM
2005-2006 BUDGET

Income

Registration Fees (21 @ \$550;
3 @ \$275) \$12,375.00

Expenses

Consulting/speaker fees \$5,750.00
Retreat \$1,000.00
Kick-off Dinner/Reception \$2,000.00
Lunches for sessions \$2,500.00
Graduation Ceremony \$1,500.00
Miscellaneous \$500.00

Total Expenses \$13,250.00

Difference (\$875.00)

**LEADERSHIP FORUM
GRADUATION CEREMONY
May 23, 2006
12:00 – 1:30 p.m.
The Dixon Gallery and Gardens**

WELCOME

Barbara Zoccola, President
Memphis Bar Association

INTRODUCTION OF SPEAKER

REMARKS

The Honorable A C Wharton, Jr.
Mayor, Shelby County

PRESENTATION OF CERTIFICATES

Barbara Zoccola and Kathy Story,
Leadership Forum Consultant

PRESENTATION OF SERVICE
PROJECTS

Leadership Forum Graduates

Leadership Forum Graduates:

Kevin D. Balkwill

Mary Helen Beard, FedEx

Caroline Boswell, Baker Donelson Bearman Caldwell & Berkowitz, P.C.

Taylor A. Cates, Burch Porter & Johnson, PLLC

Laurie L. Christensen, Baptist Memorial Health Care Corporation

Craig C. Conley, Thomason Hendrix Harvey Johnson & Mitchell, PLLC

Salam David, Siskind Susser, P.C.

Joey Dudek, Butler Snow O'Mara Stevens & Cannada, PLLC

Katrina U. Earley, U.S. Attorney's Office

Bert Echols, Husch & Eppenberger, LLC

Whitney K. Fogerty, Lewis Fisher Henderson Claxton & Mulroy, LLP

Marcy N. Ingram, Shelby County Attorney's Office

Michelle Kimbril-Parks, Shelby County District Attorney General's Office

Theodore T. Kitai, The Bogatin Law Firm, PLC

Emily Turner Landry, Baker Donelson Bearman Caldwell & Berkowitz, P.C.

Melissa M. Manns, The Terminix International Company

Carmel Morgan, Law Clerk to Justice Janice M. Holder

Scott B. Peatross, Bateman Gibson, LLC

Stephen G. Smith, The Hardison Law Firm, P.C.

Nikki M. Tinker, Northwest Airlink

Van D. Turner, Glankler Brown, PLLC

Lew Wardlaw, Martin Tate Morrow & Marston, P.C.

Clarence A. Wilbon, Bass Berry & Sims, PLC

Craig A. Willis, Shelby County Attorney's Office