

CHAPTER 2: KNOW YOUR ORGANIZATION - PAST AND PRESENT LEADERS, ACTIVITIES, POLICIES AND PROCEDURES

Before you start specific planning for your year as Chair, it is absolutely essential to learn all you can about present leaders, activities, policies, organizational structure, procedures, and its successes and failures. Some of this information will come through reviewing documents: old newsletters, agendas, minutes of Board or Council meetings and the by-laws. Much of the information, however, will come from candid discussions with past and present leaders of your young lawyer affiliate and the state bar. It is important in these discussions to learn from past troubles as well as the successes. Only with a proper grounding in your organization's past can you make informed decisions about your future.

A. Organizational Documents

Before any of your personal meetings occur, you should carefully review your organization's constitution and/or by-laws. As presiding officer, you will be expected to know these documents thoroughly. In some instances, they will govern the agenda for your meetings. For example, when should your nominating committee be appointed? When should by-law amendments be presented to the membership? How much notice is required to the membership before a by-law amendment may be considered at a meeting?

You should also be familiar with Robert's Rules of Order. Though many consider these rules to be overly technical, they can serve a useful role. Even if you do not follow them to the letter, they can help you run your meeting in an organized, efficient and controlled fashion.

B. Past Activities

One of the first things you should do is review the minutes, agendas and newsletters of your organization for the prior year and for several prior years, if possible. Often, history will repeat itself and you will be considering similar topics at similar times of the year. In addition, you want to avoid unnecessary revisiting old business. Such a comprehensive review also helps you to learn the politics of the organization. In all likelihood, you have notes from your organization's activities during the years you have been involved. Don't just leave them gathering dust in your cabinet; review them!

In addition, staff members who have worked with the affiliate for some time are useful sources of information and can help in establishing direction for your year as chair. They may also know where the old files and documents are being kept.

C. Past and Present Leaders

It is essential for you to meet with your immediate predecessors; the more of them with whom you can discuss your organization, the better. This will give you a sense of your organization's history and mission. It is also helpful for the other members of your governing board to meet these past leaders.

It is also important to meet with your senior bar leaders. You need to meet with them in a setting conducive to candid conversation, preferably one-on-one at a lunch or breakfast meeting. In addition to private meetings with leaders, you should consider having a social event to which they are invited so that you can all get to know one another on a more informal basis. Nevertheless, a social event is not the time or place to get substantive information, so you cannot use this as a substitute for your separate meetings with senior bar leaders.

In addition, you need to know the members of your young lawyers governing Board or Council and other leaders, such as committee chairs, with whom you will be working. Personal meetings with each committee chair are essential as are meetings with Board members. You will be much better off knowing their personalities, strengths and weaknesses. Remember that your Board will be together for an extended term and that you must pursue your substantive goals while maintaining a friendly atmosphere. You will need to harmonize numerous human attitudes and personalities, while avoiding the temptation to impose your desires over those of the group. Your basic task is to understand what the people want, and the best way to implement it while keeping personal interactions friendly and fruitful.

There are numerous personality profile instruments available on the market today. You may want to select one and have your Board and officers go through it during a retreat so that you may understand one another quickly. Such information could help you make better use of everyone's talents during the year.

After you gather information about your past, one of the first steps may be to organize a "kitchen cabinet," a group of past and present leaders whose advice you value. You can pass your ideas by this group as you progress with your plan.

D. Policies and Procedures

As a leader, you must know the policies and procedures applicable to your bar. Particularly if you are leading the young lawyers section of a mandatory bar, there will be activities. Obtain copies of whatever written docs there are summarizing these policies and circulate them among your Board members and committee chairs. These individuals should also be informed about any procedures and deadlines for obtaining reimbursement, making travel arrangements for meetings, etc. You should assemble all these materials, as well as calendars for the year and other useful items, into notebooks or handbooks to give to Board members and committee chairs as the beginning of your year as Chair.

In your year as Chair-elect, it will be helpful to keep a notebook of that year's problems, events and people. This notebook becomes helpful in constructing a planning outline when you plan your year as Chair.