MYTHS & TRUTHS
ABOUT THE BAR PRESIDENCY
For Bars with Limited or No Staff Resources

Presented by the ABA Standing Committee on Bar Activities and Services
MYTH #1

EVERY PRESIDENT-ELECT KNOWS WHAT SHE’S GETTING INTO; EXPECTATIONS WITH OTHERS ARE CLEAR
MYTH #2

I WON’T HAVE A PRACTICE, A SOCIAL LIFE, A FAMILY OR CLOTHES THAT FIT AT THE END OF MY TERM
MYTH #3
I HAVE TO DO EVERYTHING MYSELF; OTHERS ARE TOO BUSY TO HELP
MYTH #4

EVERY BOARD MEETING SHOULD BE RUN THE SAME & WE CAN ASSUME BOARD MEMBERS KNOW WHAT WE EXPECT OF THEM
MYTH #5

EVERY PRESIDENT-ELECT KNOWS WHAT SHE’S GETTING INTO
MYTH #6

OTHER BAR ASSOCIATIONS ARE COMPETITION
VISIT SMALL BAR ADMINISTRATION PAGE
GOVERNANCE RESOURCE PAGE
Leadership resource page
http://www.americanbar.org/groups/bar_services/resources/resourcepages.html
## Communications Worksheet

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<th>President-elect</th>
<th>Executive Director OR Leadership Team</th>
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| 1. | How will you generally prefer to communicate about bar-related matters?  
   - Email  
   - Office phone  
   - Cell phone |                                   |
| 2. | Do you manage your own calendar?  
   a. If yes, is there anyone in your office I should copy?  
   b. If no, with whom should I schedule meetings, events, appointments? |                                   |
| 3. | Presidents-elect: Will you tend to handle bar-related emails at one time during the day (e.g., morning/evenings), or as they come? |                                   |
| 4. | Is there a backup person on your staff who I should pass messages to if you are unavailable? If so, please specify. |                                   |
| 5. | Would you like to have a regularly scheduled time to meet by phone or in person to touch base and exchange information? If so, when/how frequently? |                                   |
| 6. | May I contact you on your cell phone?  
   If so, between what times may I contact you about regular business? |                                   |
| 7. | If I need to reach you urgently, what is the best way to contact you that will ensure a timely response? |                                   |

*Thank you to the Oakland County Bar Association (MI) for allowing us to adapt their communications worksheet and share it with BLI participants.*
# Presidential Responsibilities, Schedules & Deadlines

## Board of Directors/Governors Meetings
- Regularly scheduled meetings
- Orientation session
- Planning session

## Executable Committee Meetings

## Appointments (Board Committees, Standing Committees, Special Committees & Task Forces, External Appointments)
**Process Begins:**
Appointments finalized by:

## President's Column Submission Deadline Schedule
Provided by the executive director or communications director

## Special events that require the president
For example:
- Chairs orientation
- Annual Meeting
- Social events
- Fundraisers
- Foundation events
- Special section/committee meeting

## External Meetings
For example:
- Court-related meetings/events
- State bar/local bar/specialty bar meetings
- Foundation board meetings
- Community events
- Funerals
- Swearings-in

## Leadership Conferences
Does the bar budget for the president to attend leadership conferences?
If yes, which ones? For example:
- State Bar Conference
- National Conference of Bar Presidents 2014 Annual Meeting (in conjunction with ABA Annual, Boston, August 5-9)
- National Conference of Bar Presidents 2015 Midyear Meeting (in conjunction with ABA Midyear, Houston, February 5-7)
- ABA House of Delegates Meetings
- Other

What expenses are the budgeted funds designed to cover?

## Important Relationships – What does the bar association/president do to cultivate these relationships? For example:
- Local Legal Aid provider(s)
- Judges
- Court Chief Administrators
- State Bar/Local bars/Local special purpose bar associations
- Bar foundation
- Law schools

## Key Documents to Review
- Bylaws
- Mission and strategic plan
- General policies
- Fiscal policies and financial reports
- Executive Director job description/contract
- Staff organization chart
- Board of Directors roster
- Board of Directors Responsibilities Statement
- Officers/Board of Directors Reimbursement Policy
- Bank signature cards
- Current membership application
- Bar calendar and office/holiday closure schedule
Handout

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Reflections from Bar Association Executive Directors

Because executive directors have the benefit of working closely with many different leaders over the course of their tenures, we thought their insights on what made leaders successful would be of immense value to incoming presidents. We asked more than 200 bar association executive directors from organizations large and small for their candid feedback about the presidents that have most effectively moved their associations forward and those who did not. Here are some representative responses:

The presidents I’ve most admired are those who took the high road. They remained reasonable, calm, analytic and thoughtful, many times in the midst of chaos and emotion. They continued to work toward a viable solution that was right for the organization, regardless of how much got thrown at them and from whom. I also appreciate presidents and board members who understand it isn’t about them. Whether positive or negative, decisions, actions or circumstances reflect on the organization, not any individual.

The presidents I’ve most admired built a consensus among board members. They virtually forced everyone to speak his or her mind on issues. They called on board members for their opinions outside of board meetings, making all of them feel more involved.

The presidents I’ve most admired discussed priorities for the year in relationship to the bar’s strategic plan. They were actively engaged in bar activities and functions, fully embracing the role as “face and voice” of the bar for their term. Then, they gracefully stepped out of the limelight at the end of their presidency.

The president I admired least kept information to himself, and did not share or discuss important issues or decisions with the executive director. This is awful. I always tell the president anything I think they might like to know so they hear it from me, not someone else. We are a team, and how can the team best pull together unless we know all that the other knows? How nice it is for the president to be able to say when someone brings something up, or reports a problem, “Yes, I am aware of that. I have already discussed that with the executive director.” And, of course, vice versa. No one likes surprises.
The presidents I’ve most admired were prepared, met deadlines, were good listeners and gathered input and advice from others before making a major decision. These presidents were willing to deal with difficult issues in a timely manner, and had the ability to understand complex issues and frame the problem based upon key facts. They never used their position for personal gain and they were willing to give others the credit for their efforts and work.

The president I admired most did not dodge the tough issues; effectively built consensus at the executive committee and board; understood that the board sets policy and left the “how to” to the staff; and trusted staff as professionals to do their job.

The president I admired least disregarded the strategic plan.

One president I admired guided people to the situation he wanted to create. He shaped behaviors of the board members and committee and section chairs by acting as if the situation he wanted was there already. He praised board members and committee chairs for every small step in the direction he wanted them to go. By doing so, he set the situation up for a positive result.

Another president used the bar presidency to send letters to every member, congratulating them on their successes and thanking them for their service to our community. She acknowledged everyone. She knew the presidency was a symbol for each and every lawyer in the community and by sending these letters, she made a personal connection.

One bar president called every chair and every board member to talk about how they fit into the bar association, their impact and the meaning of their bar work. He knew the each person’s strengths and played to them and thanked them both publicly and privately. Those who needed help, he coached. Every lawyer and every bar staff person was important under his leadership, and he got the best out of everyone.

One bar president who had a heavy trial schedule told me, “If you don’t get a timely decision from me on routine matters and I’m about to blow through a deadline, please make the decisions that are within your scope of authority.” For example, “If you don’t get my president’s message in time, do not hold the publication up because of me.” If it’s a board decision, then wait for the board. Clearly defined expectations made for good leadership.

The president I admired least pushed to exceed the budget for travel expenses and did not keep sensitive bar information confidential.
The presidents I’ve admired most were humble, positive, supported staff, understood what the association was trying to accomplish and supported it, understood the role of leaders in an enterprise, were decisive, took counsel but made up their own mind, and were not afraid to disappoint or even anger someone for the right reasons. They worked hard at focusing on the big picture and where their actions and decisions fit into it, and advanced the organization. The best example is a president who opposed a public policy position that was overwhelmingly supported by the board. When asked by a reporter why he opposed and voted against the policy position, his response went something like, “it doesn’t matter what I think or why I opposed it. The board has taken a position and as president it is my responsibility to do my best to make sure it comes to pass.” That is a leader of an organization.

The presidents I most admired had three qualities: courage, accessibility and leadership. One president had the courage to advocate for a controversial bylaws change. I also appreciate those who proactively reached out to members, law firms, agencies and even local law-related businesses for services, programs and resources, and brought that knowledge back to us. That's "insider" knowledge I don't have and it's critical to managing the bar.

The best presidents are those who work with an executive director as if we are a team, harnessed together to plow the field as best we can, shoulder to shoulder. I know they are the president, and I work for them, but we are in this together. Different skill sets, abilities, perspectives and responsibilities, but we are in it together.

What do the presidents I’ve admired most have in common? They had the highest of ethical standards; professionalism and consistency of behavior; inclusivity of others during the decision making process; candidness when potential issues arose that I might not otherwise have known about; and asked for context on issues rather than rushing to judgment without information.

The president I admired least developed a pattern of making decisions that benefited his firm and clients rather than the bar association.
The presidents I’ve admired most understood it wasn’t about them, infused fun in their service, and valued the opinions of others especially when they didn’t agree. These presidents thought strategically rather than emotionally.

The presidents I’ve most admired are those who viewed their role as representing the bar association and all its members in accordance with either court directives or the strategic plan, and are mindful of the budget. They were also those who tried to build consensus, but offered leadership when necessary. They were not advocates for their personal position but that of the bar association. They led the board to enact policy and let staff and committee volunteers implement.

The president I admired least overspent on a personal project and created severe repercussions for the budget.

The president I most admired created a "No Filter" rule. This president's first order of business with me was to create a clear and concise channel of communication. "No Filter" meant that if she screwed up, I told her. If I screwed up she told me. Honesty.

Another president asked the question at the beginning and end of every meeting: "How does this meeting benefit our members?" This was selfless leadership that kept all involved and focused.

The president I admired least was too quick to speak and act. This president proposed actions without knowing if these actions were necessary, practical, affordable or if these issues had been addressed in the past and to what result.

The presidents I’ve admired most were cognizant of the need to leverage the role of president to support younger leaders at the committee and section level. They were actively engaged and communicative with foundation and foundation leadership (“we are all on the same team”). They looked beyond their own practice setting and acknowledged the importance of members and perspectives that were different. These presidents recognized it’s not about them. It’s about how they can leave the association and foundation in a better place than they found it.