

A “HOW-TO” KIT TO HELP YOU PLAN FOR AN EFFECTIVE TERM AS BAR PRESIDENT

**National Conference of Bar Presidents
Communications Committee**

GETTING THE LAY OF THE LAND AS PRESIDENT-ELECT OR VICE-PRESIDENT

1. Meet with your Executive Director or other appropriate staff member to:
 - Discuss your duties this year. In addition to being “president-in-waiting,” your current position (president-elect, vice president) probably has duties prescribed in your bylaws; find out what the official duties of your current position are.
 - Find out what meetings, conferences and conventions the president-elect customarily attends and what role you play in them.
 - Learn which invitations you must accept and the ones to which you can say “no” to during your term as president.
 - If you don’t already know, find out which bar staff members are responsible for the various aspects of your position (e.g., meeting location selection and other meeting arrangements).
 - Learn all of the details relating to your installation. What are the things (e.g., gifts or mementos, farewell remarks, moderating meetings) that the incoming president does?
 - Determine your bar’s policy on media interaction and if, as is often the case, the policy provides that the president is the spokesperson for the organization.
2. Meet with your current president to discuss:
 - What he or she will need or require from you during his or her year in office.
 - Any ideas you have for your term for which he or she can help lay the groundwork.
 - Any times during his or her term that you will be unavailable due to professional commitments or vacations.
3. Familiarize yourself with your bar’s financial apparatus and all aspects of its financial condition.
 - Be conversant with the financial condition in which you will inherit the leadership of the organization — many a president’s agenda has been derailed by unforeseen or poorly-managed financial crises!

4. Pay a “courtesy call” on the presiding judge of your local court or, if you are a state bar president, the chief justice of your state court.
 - Offer to make yourself available to meet or talk regularly and to participate in bench-bar functions (subject, of course to the role of your current president). Keep the lines of communication open. (In many jurisdictions, the courts view the bar as their primary means of communicating with the practicing bar. Also, the cooperation of the local or state judiciary is a key component to the success of many bar programs and projects.)

SCHEDULING

1. Set up a separate calendar to keep track of bar commitments.
 - Go to your bar’s web page, if it has one, to check the bar’s long-range calendar. Most bars maintain such calendars and they usually have the dates and locations of recurring meetings (such as your bar’s annual meeting and the two annual ABA meetings) as much as two years in advance. Get as many of these dates as possible on your bar calendar now — and be sure to allow for travel time at the beginning and end of out-of-town events.
 - You may or may not want to integrate this calendar with your office/trial calendar. However, it is important that it be readily accessible and allows you to view at least a month at a time.
 - Keep this calendar current (or ask your secretary or another member of your own staff to do it) throughout your year as president-elect and president. If it is not integrated with your office/trial calendar, cross-reference them at least weekly, if not daily.
2. Contact organizations that customarily invite the president.
 - About halfway through your year as president-elect, write to these groups (e.g., local bars if you are a state bar president) and ask them to notify you as soon as possible of the dates they would like you to appear.
 - A sample letter is attached as Form A.

PREPARING YOUR FIRM AND CLIENTS

1. Be realistic about the impact of your presidency on your practice.
 - It’s easy to convince yourself that, if you’re organized enough, you’ll be able to maintain your billings and attention to your clients unchanged, and still meet your commitments to the bar. Regardless of the size of your bar, this is unrealistic.
 - Recognize that you’ll have to scale back your practice in order to do your job as bar president, get used to the idea, and make the necessary staffing or other adjustments in your firm (see below). This will pay huge dividends by eliminating perhaps the biggest potential source of stress during your term.

2. Keep the members of your firm informed.

- You undoubtedly talked with your colleagues about the demands of your position before you pursued the office. However, we all tend to underestimate the extent of the commitment ahead of time. So, as your knowledge of the requirements of the job becomes greater and greater, you should regularly pass this along to your partners and associates.
- Keep an eye on practice commitments that you will need other members of your firm to help you with or cover for you, and make the necessary arrangements with them well in advance.
- Nobody likes surprises, and most people can deal with most things if they just have enough advance notice. Keeping your colleagues informed and “in the loop” — early and often — about expected absences and demands on your time will minimize friction and resentments when the time comes.
- Don’t expect — and tell your colleagues not to expect — that you’ll be back to full capacity the minute your term ends. Prepare them to be patient. Your “re-entry” will take time.

3. Prepare your clients for what’s ahead.

- Begin informing new and existing clients of your impending service at least six months before your term is to begin.
- Consider limiting the number or types of cases you accept during the six months or year before your term begins.
- Consider having a partner, associate or paralegal sit in with new clients so that someone else knows the details of the case. That way, there will be someone else for the client to talk to when problems or questions arise while you are out of the office.

WRITING SPEECHES AND ARTICLES

1. Begin to think about your President’s Messages.

- Talk with the bar’s publications staff to determine the publication schedule, and how many president’s messages you will need to write.
- Determine the deadlines for submitting your articles for publication for the whole year. Put them on your calendar. Meet them!!
- You may already have some themes you want to write about. If not, or if you don’t have enough ideas, sample other bar publications (you can get them from the ABA’s Division for Bar Services). Don’t worry about being a “copycat.” Imitation really is the sincerest form of flattery, and most presidents will be flattered if you follow their lead in what you write about, or use their writings as a jumping-off point for your own.

2. Begin to think about your major speeches.

- You will know from your discussions with staff which events will need speeches.
- Give some thought to the specific remarks each occasion will require. You will only have the “bully pulpit” for a short time, so maximize each opportunity to be an opinion leader on subjects important to you or the profession.
- Jot down ideas for your installation speech and other major addresses. Put these in a file.
- If you hear speeches — not necessarily bar leaders’ speeches — that you admire, ask the speaker for the text. Invariably, the speaker will be flattered and readily agree.
- Whatever you do, avoid “winging it.” The person who can get away with this is a rare person, indeed. For the rest of us, our audiences can tell if we haven’t thought about and prepared what we want to say.

3. Get your hands on a good book of quotations.

- The right quotation can make the difference between a good article or speech and a great one. Some suggestions:

The Oxford Dictionary of American Legal Quotations, by Fred Shapiro

Quotations for Public Speakers, by Sen. Robert Torricelli

The Quotable Lawyer, by Elizabeth Frost-Knappman and David S. Shrager

Quote It : Memorable Legal Quotations, Data, Epigrams, Wit and Wisdom from Legal and Literary Sources, and Quote It II: A Dictionary of Memorable Legal Quotations, by Eugene C. Gerhardt.

4. Remember to credit anyone whose material you use.

PROGRAMS/INITIATIVES

1. “Bone up” on the critical issues and challenges facing your bar and the profession as a whole.

- Re-read the last year or two’s president’s message in your bar journal.
- Read a book or two about current legal culture and issues. Some ideas:

A Nation Under Lawyers : How the Crisis in the Legal Profession Is Transforming American Society, by Mary Ann Glendon

In the Interests of Justice: Reforming the Legal Profession, by Deborah L. Rhode

Transforming Practices: Finding Joy and Satisfaction in the Legal Life, by Steven Keeva

2. Consider doing a survey of bar leaders (or, if economically feasible, your membership) to determine what issues concern them.
3. Select a modest number of issues you want to address and/or goals you want to achieve during your term.
 - Make a list of issues and challenges — for both your bar and the profession as a whole — that are of concern to you.
 - Poll your executive committee to learn what issues concern them.
 - The ABA is an excellent source for learning about cutting-edge issues. Begin your search by visiting the ABA Web site at www.abanet.org and determine what issues are perceived to be important to the profession from the NCBP and BLI programs.
4. Once you have settled on the issues and projects that interest you, talk with your executive director.
 - Determine what your bar has done in these areas in the past.
 - Discuss the dimensions and feasibility of the ideas you have, as well as their cost, their impact on staff, and the timing and logistics of carrying them out. Do a serious cost-benefit analysis before making a commitment to a project.
 - Decide whether projects should be assigned to existing committees or sections in your bar; or whether a task force or committee should be set up for one or more specific projects.
5. Set specific deadlines and targets for the committees or task forces to which you assign projects.
6. Talk about your plans in your installation speech and President's Pages.
 - If your goals or projects will require the approval of your governing body or executive committee, you can build support by explaining your goals and why you think they are important to your bar.
 - If there is a financial or staff commitment associated with them, you will need to establish them as priorities with your leadership colleagues and the general bar membership.

COMMITTEES

1. Prepare to address committee appointments well before the beginning of your term.
 - It's important to get this done as early as possible. If you wait until your term starts, it will be too late.

2. Consult with the bar's executive director and/or the bar staff's individual committee liaisons
 - Obtain committee rosters, with designations of members whose terms expire.
 - Determine the requirements for committee composition. (Many bars' bylaws have requirements relating to committee makeups, such as a minimum number of executive-committee or governing council representatives.)
 - The executive director and/or bar staff liaisons should be an excellent source of intelligence on which chairs were effective and which were not; and which committee members worked hard and which didn't.
 - Likewise, your executive director is probably knowledgeable about various individuals throughout the bar, and thus can be a great source of ideas for new appointees when you're stumped.
3. Send letters to chairs.
 - Determine if they are willing to be re-appointed if that is your determination; and, if not, whom they would recommend to succeed them.
 - Obtain recommendations from retiring chairs as to who their successors should be, and if there are any people eligible for re-appointment who shouldn't be re-appointed.
 - A sample letter is attached as Form B.
4. Publicize the availability of committee positions.
 - Use your bar's publications, Web site, etc., to inform the membership about committee vacancies and your process for filling them.
5. Organize the information.
 - Make up rosters showing vacancies so you can fill in the names of the new appointees.
 - Put applicants or nominees on a chart with first, second and third choices
 - When you've completed each committee's roster, send a letter to the chair (including the date and time of the committee's organizational meeting, if you intend to hold them; see below) along with the roster of new and re-appointed members.
 - A sample letter is attached as Form C.
6. Get your committees off to a fast start
 - Don't leave it up to your individual chairs to get the bar year started.

- Consider scheduling organizational meetings of all committees over a one- or two-day period, and attending each meeting for a few minutes to detail your plans for each committee and give them a “pep talk.”

7. Nice extra touches:

- Send letters to committee applicants that you couldn't find spots for, thanking them for their interest and encouraging them to apply next time.
- Write to retiring chairs and committee members and thank them for their service.

USE THE RESOURCES OF THE NATIONAL CONFERENCE OF BAR PRESIDENTS AND THE ABA

1. Attend the NCBP meetings in the year before your term begins, as well as the Bar Leadership Institute (held every March in Chicago).
 - NCBP meetings regularly include a program that describes cutting-edge issues and challenges to the organized bar, and the bar's response to them. There are also a variety of workshops dealing with issues of interest such as professionalism; diversity; successful bar projects; and new initiatives — to name only a few. You can also visit the NCBP's Web site at www.ncbp.org.
 - The BLI offers useful, practical training for incoming bar leaders, in areas such as governance; strategic planning; bar leader/media interaction; public speaking; writing presidents' pages; and is also a very good way to learn about of the latest programs, issues and ideas.
2. Consult a well-respected, successful former bar president in your region through the NCBP's Executive Council for help with planning for your year, and advice during your term.

[Date]

[Name and Address]

Dear [Local Bar Leader]:

As you know, I will begin my term as president of the [Name of Bar] in [month] of this year, and during my term, I plan to continue my recent predecessors' contact with organizations such as yours.

Because the scheduling demands on our presidents have increased so greatly in the past few years, I am attempting to "get a head start" by making travel and speaking plans as far in advance as possible. I am also hoping to schedule multiple events when I will be in a particular part of the state.

To assist with my planning, if your organization intends to request that I attend one of its meetings or other events between June 2000 and June 2001, I would be grateful if you would let me know as soon as you are able. I understand that it may be extremely early, and that your plans may not yet have been finalized. However, it would be enormously helpful if you could let me to know your intentions, if you can, during the next few months.

I look forward to hearing from you, and to responding favorably to any invitation you may choose to extend to me.

Very truly yours,

FORM B

[Date]

[Name and Address]

Re: _____ Committee

Dear :

As you are aware, the time for me to begin consideration of committee appointments is upon us. In order to make informed decisions as to the appointments of chairs and members of our various committees, it is essential that I obtain your input as chair of the committee.

May I ask that you write or telephone me, at your earliest convenience, to provide with your thoughts as to the following:

1. If your term on the committee is not expiring, do you wish to continue as chair? If not, do you have a recommendation as to who should serve as chair? Do you have a recommendation as to who should serve as vice chair?

2. Are any members concluding their final terms and not eligible for re-appointment? If so, please indicate who they are.

3. With respect to members who are completing their initial terms, please give me your candid impressions of the level of participation and contribution of these persons, and whether or not they should be re-appointed, if they so request.

4. Are there persons on your committee whose level of interest in the committee, and level of participation in its work, indicate that they should be asked if they wish to step down from the committee (or be asked to step down from the committee), even though their terms may not have expired?

No reminder should be necessary as to the importance of this task; the bulk of the work of this organization is performed by its committees. Accordingly, it is critical that you be as candid and straightforward as possible in providing the information specified above.

Likewise, due to the size of this undertaking and the relatively short time remaining before I take office, your prompt attention to this request would be most appreciated.

I look forward to hearing from you.

With best regards,

FORM C

[Date]

[Name and Address]

Re: _____ Committee

Dear _____:

This will confirm that you have agreed to serve as Chair of the [Committee Name] Committee for the bar year. I am appointing [Name] to serve as Vice-Chair of the committee, and enclose a roster of this year's committee members. They are being notified of their appointment, re-appointment or continuing service by copy of this letter.

As I may have previously informed you, we are asking each committee to hold its organizational meeting at the bar office on either or . Your committee's meeting date and time are: _____. At this meeting, I will speak briefly about any specific projects I may have for the committee during this bar year, and would also like to hear the thoughts of you and the other members of the committee regarding its activities for the coming year. I hope that every member of the committee will make a special effort to be present for this important meeting.

My thanks to you and all of the members of the committee for your willingness to be of service to the bar. Volunteer efforts such as yours are the backbone of the work of the bar, and we could not accomplish as much as we do without these contributions of time and talent.

I look forward to working with you during what I am sure will be an exciting and productive year.

Very truly yours,