



The Successful Executive Director: White Paper, Resource and Checklist



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About this Document

This white paper is the result of a review of the academic literature and interviews and surveys of executive directors, bar association staff and leaders about what constitutes success in the role of chief staff executive. To help you assess your own strengths we have included a [checklist for success](#) and a [self-awareness assessment](#).

Introduction

Recent surveys and interviews have reinforced that success for a bar association chief staff executive (CSE) doesn't just require strength in one or two areas of leadership and management, but the ability to juggle, balance and excel in myriad ways. There is little deviation in the perspectives about what skills are important — bar association executive directors ***need to be good at everything***.

Considering the seemingly “super-human” requirements, the ability to survive and thrive boils down to three essential ingredients:

1. **Elevated emotional Intelligence (EI)** – essential for trust, influence, leadership and coaching, emotional intelligence is described as the “Meta-Skill of the 21st Century”
2. **Maintaining a personal sense of balance** (see #1.) – knowing what skills to use and when; sensing what is more important and less important, in other words not all battles are equal nor are all competing priorities
3. **Using a collective network of connections, support and resources** – necessary for hearing and sharing knowledge, advice, empathy and “caring criticism”

What Organization Management Experts Say

The bar association management environment is already more complex and demanding than most. With growing challenges ahead for both the legal profession and for organizations heavily dependent on volunteer commitment, operating is sure to get tougher.

Harrison Coerver and Mary Byers predict in *Road to Relevance* that successful associations going forward will have smaller, competency-based boards and **empowered CEO's**. The chief staff executive's knowledge of available resources, understanding of the potential impact of actions, and long-term continuity necessitate that the CSE be a trusted **partner** in decisions that determine the best use of the organization's resources.

As Coerver and Byers note: "The board and the CEO must work together as **partners** for the association to thrive. There must be candor. There must be respect. And the environment must be safe enough for disagreement when necessary." The bright lines between the board setting policy and the staff leader implementing policy will continue to blur.

CSEs and their organizations need to be more productive, more creative and more professional. It is more important than ever to utilize adapted best practices from the worlds of membership organizations and non-profit association management.

Why Emotional Intelligence Matters

After analyzing hundreds of corporations, academic institutions, government agencies and other organizations, Daniel Goleman, Richard Boyatzis and Annie McKee, the authors of *Primal Leadership*, have a "rule of thumb" that "Emotional Intelligence contributes 80 to 90 percent of the competencies that distinguish outstanding from average leaders." **80-90 percent** (sometimes more)...even if the authors are off by a lot, EI is something to continuously cultivate!

As author Tasha Eurich points out early in her book *Insight*:

There is strong scientific evidence that people who know themselves and how others see them are happier. They make smarter decisions. They have better personal and professional relationships. ... They're more creative, more confident, and better communicators. They're less aggressive and less likely to lie, cheat, and steal. They're better performers at work who get more promotions. They're more effective leaders with more enthusiastic employees...

EI competencies are strengths that can help meet the expectations articulated by bar association chief staff executives, managers and volunteer leaders. The importance of these skills increases with advancement to higher levels of an organization for obvious reasons, including what is described in *Insight* as "CEO Disease: The tendency for people in powerful positions to be less self-aware; when the overconfidence that results from past successes makes it challenging to hear feedback-and others reluctant to give [it]."

What Colleagues Say

Bar association executive directors and other professional staff were recently surveyed on perspectives about best practices and desired strengths for the chief staff executive position. The attributes presented in the survey were compiled through a review of numerous organization “best practice” sources.¹

As noted in the introduction, there was very little deviation in the value survey respondents assigned to the various qualities and skills – either from the many bar association CSEs responding, or from the non-ED bar association NABE professionals taking the survey. Very few qualities were considered only “Nice to Have-Not Essential,” while most were placed in the “Necessary” or “Essential” categories.

When considering traits most important to the success of a bar association executive director, **both** CSE’s and professional staff identified being Honest, Principled, Authentic, Ethical, Accountable and Credible most highly valued.

When executive directors wrote about factors that contribute to their success, the most often referred to related to communication and listening skills, relationship-building, and being flexible and adaptable. “Board relationships” were frequently referenced as important elements for CSE success – both in terms of giving support to the Board and having the support of the leadership group. Team-building, supporting the staff, and benefiting from connections with colleagues were also included among the “interpersonal” factors noted much more frequently than experience, “hard” skills like writing or “soft” skills like creativity.

Similarly, non-ED’s suggesting advice for a new CSE mentioned most frequently the same notions of building relationships, listening and communicating and being flexible and adaptable. They mentioned staff morale and support and team building slightly more often than ED’s.

Reflecting the high sensitivity to budget and finance that characterizes legal professional associations, fiscal responsibility was the one “hard” skill both groups mentioned most frequently.

The chief staff executive is the steward of the most valuable, and likely most costly, asset of the organization – the staff. Nonprofit consultant Tracy Vanderneck, writing for *NonProfitPRO*, an on-line resource for non-profit professionals, notes that “In most cases, the look, feel, practices, attitudes and organizational philosophy emanate from the person at the top of the organizational chart: the executive director/CEO...who manages the agency’s staff and who is generally the face of the organization in the community. It is their style, personality, competency and ability to lead that sets the tone.”

Equally important, the chief staff executive should be the lead provider of the most often identified motivator of staff - the **meaning** in their work. Team members, individually and as a

¹The list of attributes presented in the survey appear in [Appendix B](#). Additional analysis and discussion of the feedback gleaned in the survey process, including similarities and differences found between varying levels of experience, will be presented separately.

group, can be inspired by reflecting on the organization's impact and their roles in supporting the infrastructure that leads to those outcomes.

It is up to the CSE to maximize the power of the team by finding common ground among individual perspectives on the best environment in which to "get the job done." Showing how different individual strengths add to the "staff whole," fostering psychological safety and healthy interpersonal connections within the team is critical. Writing in his *Rescue Time* blog, workplace consultant and author Dan Schawbel says research shows that a sense of authentic connection with others is what staff members crave most and is the "hallmark of the highest-performing workplace cultures."

The most advanced leadership and relationship-building skills are qualities that should be continually honed and that emanate from the competencies found with emotional intelligence.²

What Volunteer Leaders Say

There was a comparably small response to the survey from bar leader volunteers, so a number were personally contacted. To a person, these involved and invested leaders expressed interest and support for continued development of bar association chief staff executives. Leaders gave generously of their time and input when contacted although they didn't recall seeing the survey link in the newsletter.

Why relate this? Because it illustrates an acknowledged fact: experienced bar volunteers value and support the chief staff executive role amidst the challenge of integrating multiple roles as bar leaders, practitioners, partners or managers, community leaders, parents, and spouses.

Those who gave input through the survey and interviews confirmed "honesty" as the most essential trait for executive directors. Interestingly, being "resilient" was the second most highly rated CSE attribute chosen by volunteer leaders. Leaders may acknowledge the need for "resilience" because they are aware of the many, sometimes conflicting, forces and pressures on the CSE. The continuity the executive brings to the vision and the role as steward of what is best for the association was universally mentioned. So was the need for patience and openness to input from the volunteers representing the organization's ultimate purpose. In the bar association environment, the executive director must balance a "**leading**" role with the responsibility to "**support**" and to "**execute**" ... and know which role is required, when..

There are essential and specific roles for the volunteer leaders and the staff professionals that make the "care and feeding" of the organization work. Sharing and balancing the roles has to work – elected leaders have the short-term authority, while the chief staff executive has the long-term accountability. Add in the factor of dwindling time for volunteerism, and it is easy to see why it is critical to use a bar president's time for the most valuable work of the board leadership.

As confirmed by experienced bar association leaders, nowhere is the CSEs need for self-awareness, open communication, diplomacy and a sense of balance more pronounced than in

²A listing of the domains and competencies of emotional intelligence can be found in [Appendix A](#).

the working relationship with the association's volunteer leader. Shared leadership is a delicate dance...sometimes you have to lead, sometimes follow, sometimes get out of the way.

A healthy partnership between the chief executive and the volunteer leader avoids wasting time and energy due to overlap of efforts and duplication. Shared leadership can be especially tough in bar associations. Volunteer leaders are often at the top of a very intellectual, competitive, demanding and watchful profession. They are used to being the experts and problem-solvers. They and their colleagues have lots of great ideas. The bar president didn't run to say "no," is likely a very strong advocate, and is probably feeling pressure to make a visible and lasting difference in a one-year term. Successful executive directors channel that creativity and energy toward a shared vision for sustainability.

The critical components of a successful partnership – Trust and Respect – need to be earned with these trained skeptics. And once established, like all good relationships, the leadership partnership needs consistent care. Boundaries are necessary, but messy. Be flexible..."know when to hold them, and know when to fold them..." When there is conflict with a volunteer leader, the successful CSE will carefully consider if and when a situation requires standing firm with a differing view for the organization's ultimate benefit.

Conclusion

Like any top management position, the CSE has to have the ability to handle management basics, or at least be surrounded by support staff that can handle such responsibilities. Ultimately, being a chief staff executive in a membership association for the legal profession is a **relationship business**. Recent surveys, interviews, and scans of industry "best practices" confirm the importance of interpersonal skills and strengths. While managing in the "daily grind," it is hard to focus on a concept like emotional intelligence, and yet it is EI that will make the "grind" much smoother. Every one of the competencies of emotional intelligence directly ties to the most important qualities for a bar association chief staff executive.

Maintaining "Balance" – All of the skills required of a bar association executive director make the position a tall order for **one individual**. If you are reading this, you know that. It requires what has been described as "constant calibration," "situational leadership," and "nimble shifting of focus, style and priorities." Keep in mind your guiding principles. Remember the advice of the "Serenity Prayer" to strive for "...the serenity to accept the things I cannot change, the courage to change the things I can, and the wisdom to know the difference."

...And when you utilize the resource of colleague networks, you are no longer just "**one individual**." Depending on a community of colleagues helps to fight isolation, maintain (or gain!) perspective, and avoid reinventing the wheel. *Insight* author Tasha Eurich advises seeking out the "loving critic" – one neither likely to criticize everything nor praise everything, but who is knowledgeable about the issues and environment, and who is in a position to give honest, risk-free feedback. The bar association community is particularly fortunate to have a strong network with opportunities for connection and tools to foster communication. NABE colleagues, who are themselves invested in constant improvement, make a ready resource for constructive feedback and support.

Checklist for Success

- Do additional reading on emotional intelligence (consider *Working with Emotional Intelligence* by Daniel Goleman; *Primal Leadership* by Goleman, Boyatzis and McKee; and *Insight* by Tasha Eurich)
- Add “emotional development” to your own professional development plan and update these plans on a regular basis
- Review (again and again) NABE’s *The First Eighteen Months: An Onboarding Guide for Success as a Bar Association CSE* – no matter how many years you have been in the executive director position, review this guide regularly as a great reminder of basics
- Distill staff roles into how each advances the mission directly and/or indirectly and share those contributions with groups and individuals on a regular basis
- Create or expand your leadership orientation plan – start orienting those on the “leadership track” early; schedule periodic meetings (in addition to hour+ sessions, consider a cup of coffee or a quick call) to keep the lines of communication open; have a checklist of questions to ask
- Develop shared expectations on an ongoing basis of roles and responsibilities among staff and volunteer leadership
- Create a “contacts calendar” to schedule outreach “tasks” – include internal and external relationships
- Know what battles are worth fighting
- Never throw anyone under the bus, you are the driver
- Commit to boundaries
- Adjust your communications style to new leaders
- Have a kitchen cabinet of NABE colleagues and volunteer leaders for reality checks and support
- Articulate a shared vision for success
- Insist on an annual review with goal setting
- List three questions or ideas about your association work and use your professional network tools (including NABE) to get them out
- Take the Myers-Briggs, DISC or other assessment tool for you and your leadership team
- Add items/events to your calendar to commit to personal, non-work-related enrichment and wellness

Questions to Ask Yourself: A Self-Assessment

- Is volunteering/working with me fun? Can I help make it more so? If it can't be fun, is it rewarding?
- How many questions did I ask today? Did I ask the right questions?
- Have I said “thank you” today?
- Am I sharing enough information?
- How do I deliver tough messages?
- Do I seek feedback? Do I make it safe to give me feedback?
- Can I hear constructive criticism?
- Do I have adequate “systems” in place to deal with things that trigger my emotions?
- How do I think others perceived me today? How do I want to be perceived tomorrow?
- Is [a difference of opinion or approach I am having with a volunteer or staff member] really important? Why?
- Do I know what motivates and matters to [staff, leaders, me]?
- What do I respect about the people I work with closely?
- Have I talked with [volunteer leader] about how best to use my time and their time?
- What is our “common ground?”
- What is important to me about this work – does it still excite me? If not, how can I get that excitement back?
- Am I sharing credit? Am I getting credit? Do I need to “see my name in lights?”
- Who can I talk to about this?
- What do I do to maintain perspective?

Emotional Intelligence Domains and Competencies

(from *Primal Leadership*)

PERSONAL COMPETENCE: These capabilities determine how we manage ourselves.

- **Self-Awareness**
 - *Emotional self-awareness:* Reading one's own emotions and recognizing their impact; using "gut sense" to guide decisions.
 - *Accurate self-assessment:* Knowing one's strengths and limits
 - *Self-confidence:* A sound sense of one's self-worth and capabilities
- **Self-Management**
 - *Emotional self-control:* Keeping disruptive emotions and impulses under control
 - *Transparency:* Displaying honesty and integrity; trustworthiness
 - *Adaptability:* Flexibility in adapting to changing situations or overcoming obstacles
 - *Achievement:* The drive to improve performance to meet inner standards of excellence
 - *Initiative:* Readiness to act and seize opportunities
 - *Optimism:* Seeing the upside in events

SOCIAL COMPETENCE: These capabilities determine how we manage relationships.

- **Social Awareness**
 - *Empathy:* Sensing others' emotions; understanding their perspective, and taking active interest in their concerns
 - *Organizational awareness:* Reading the currents, decision networks, and politics at the organizational level
 - *Service:* Recognizing and meeting follower, client, or customer needs
- **Relationship Management**
 - *Inspirational leadership:* Guiding and motivating with a compelling vision
 - *Influence:* Wielding a range of tactics for persuasion
 - *Developing others:* Bolstering others' abilities through feedback and guidance
 - *Change catalyst:* Initiating, managing, and leading in a new direction
 - *Conflict management:* Resolving disagreements
 - *Building bonds:* Cultivating and maintaining a web of relationships
 - *Teamwork and collaboration:* Cooperation and team building

CSE Survey Attributes List

Core “Internal” Personal Traits

Authentic
Creative
Curious
Energetic
Enthusiastic
Humble
Honest
Idealistic
Intelligent
Intuitive
Optimistic
Organized
Principled
Resilient
Self-aware
Sensible

“Outward Facing” Personal Traits

Accountable
Approachable
Confident
Credible
Dependable
Diplomatic
Empathetic
Ethical
Fair
Flexible
Inclusive
Observant
Persistent
Realistic
Respectful
Well-spoken

Interpersonal Skills

Builds and maintains positive relationships
Cultivates respect
Inspires others
Practices active listening
Utilizes effective negotiation skills
Effectively problem-solves
Is persuasive
Effectively advocates for staff
Utilizes effective conflict resolution skills
Effectively advocates for people, causes, entities
Keeps confidences
Is transparent about decision-making

Staff Management

Set individual staff goals
Determine operational priorities
Communicate program value
Clarify and communicate expectations to staff
Communicate governance expectations to leadership
Delegate effectively
Encourage and demonstrate collaboration
Build and maintain an effective team
Provide constructive feedback
Develop and maintain staff commitment to mission
Invest in and develop others
Demonstrate and encourage appropriate work/life balance

Organizational Management

Overall

Focuses on the Big Picture

Demonstrates Best Practices

Invests in the Organization's Mission

Managing the People and Culture

Practices entrepreneurial thinking

Fosters effective communication

Cultivates a healthy, productive culture

Exercises good judgment

Establishes valuable community connections

Creates a climate of excellence

Shares information willingly and frequently

Provides feedback and recognition

Utilizes volunteers effectively

Works effectively with board

Seeks and utilizes feedback

Cultivates a learning environment

Managing Operations

Establishes and monitors sound financial practices

Effectively seeks revenue

Effectively controls expenses

Establishes and maintains good hiring, training and feedback practices

Demonstrates attention to detail

Objectively assesses program efficacy

Seizes opportunities

Encourages strategic thinking

Develops tactical plans

Encourages healthy risk-taking

Monitors environment for opportunities and threats