



## ***Presidential Planning Tips from NCBP***

*February 2022*

So you have succeeded in becoming the president-elect of your bar association – now what? First, don't panic; okay, you can panic a bit. But if you manage your time, delegate, and plan for the year, you should do fine (or at least survive).

### **Learning opportunities**

If you or your association can afford it, make plans to attend the ABA Bar Leadership Institute (BLI) held in March in Chicago. And plan to attend the NCBP midyear and annual meetings during your president-elect and presidential terms. All are excellent opportunities to learn both from the formal programming and from informal sharing with colleagues. Between the live events, visit the NCBP sites (including Facebook) for updates and as questions you may have arise. Most bar issues have come up before and knowing how others addressed them – and the results of such efforts – can be valuable.

### **Start early**

Many bar associations have numerous presidential appointments – sometimes other officers (treasurer or secretary) and some committee or section chairs may be presidential appointments. Particularly if you are appointing the treasurer, that should not be a figurehead or honorary appointment. You want someone who will understand and monitor the finances. The association should have its own outside accountant, but you want to follow the money (more on this below).

If you are appointing committee or section chairs, understand the process and what has gone on before. Is there a tradition of appointing a co-chair or vice-chair who could easily transition into the chair position the next year? If this is not already in place, consider implementing it. If there is going to be a longer lead time, discuss the vice chair candidates with the person who will be your president elect (hopefully but not always known by the time you should make appointments).

Consider starting early on your president's page(s) for your bar publication. Given the typical lead time, the president's message is not likely to be breaking news anyway. If you have certain events you want to draw attention to – like an annual bar dinner or Law Day – you will know when they are scheduled. So don't wait until a few days before the deadline – and especially do not make your bar's magazine, etc. untimely by a late submission. You might consider having one timeless topic (like professionalism or what the association can do for its members) in the can in case you get too busy near the deadline.

## **Meet and know your team**

During your president-elect term you should get to know (or know better) your association's executive director. You are going to need to rely on the director and bar staff to carry out your goals and for the day-to-day running of the bar. Learn to delegate – and appreciate what is reasonable to expect given time and monetary constraints.

Consider a social gathering with the director and staff early in your term. This could be at the bar office but might be enjoyed more at a home or local public gathering spot. During your year, keep things in perspective. For example, if there are frequent publications and email blasts, there are going to be some typos. Relax. And most important: remember to say: “thank you.”

## **Follow the money**

Review your bar's financial information and understand its financial status. As president-elect you should be involved in forecasting the budget. Remember, it is only a forecast. How have previous budgets and real-life experience compared? Consider the cost of proposed new programs or events and how they might be funded.

Bars vary in financial strength. Most potential shortfalls are from unexpected events or honest mistakes. But there have been a few episodes of serious dishonesty. The closer people watch, the better for avoiding or catching any sort of problem early.

Whether or not you are a “numbers person” (and you should be at least minimally), make sure your treasurer is. That should not be a figurehead position.

## **Manage your time**

Depending on how busy your bar is, you are likely to find you have a fuller calendar than before. Some people carve out a block (or blocks) each week for “bar work.” But not every event or meeting you want to attend will fall in those time slots. So, flexibility is important. As is getting from one commitment to another timely – so check your timepiece.

## **Getting and sharing information**

As noted, use the NCBP – meetings and website – as a resource. Your executive director should be a good sounding board. Most execs can provide institutional knowledge on what has worked or not before. They may have input based on contacts with others in their position. Past presidents are generally happy to serve as a sounding board for ideas or when problems arise. Keep the president-elect in the loop. CC them on pertinent emails. It is in your association's interest to have a smooth transition when the time comes.

## **You are the face of the association and profession**

During your year you are likely to have interactions with many more lawyers – and nonlawyers – than you imagine. Speak up for our profession. Be upbeat and don't complain about a job you asked for. And very important: have some fun.