



NABE Small Bars Section

Our Mission! To ensure that a Small Bar 'keeps calm and carries on' in the event of an unlikely bus hitting, lottery winning, or staff exodus from the organization!

How – A small group of volunteers from the NABE Small Bar Section has agreed to form a Task Force, meet remotely, and pool our knowledge and experience.

End Product - A Small Bar Handbook Template was created. The Template lists all the working elements and functions of any one small Bar Association. A Small Bar would then use this list to identify what subjects are relevant to them, and create a handbook which includes essential details and information to keep their Bar functioning in the case of a staffing emergency

And it is our hope that our Section revisit this periodically, updating and changing the template, so it's kept relevant for our Bars.

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Small Bar Template Handbook

Small Bar Associations have a unique challenge when compared to medium and larger Bar Associations. Although a vast majority of the work is the same, Small Bars produce this work with very few staff, and unlike larger Bars, where there are many staff to overlap responsibilities and easily cover for staff absences, Small Bars do not have that luxury.

If a Small Bar finds itself in a situation where they need to rely on non-staff members to temporarily keep a Bar Association functioning, it is vital there are plans and easily accessible information readily available. Along with this detail, it is just as vital to have a policy in place that identifies who would use this information, in what specific situation, and where this pertinent detail can be found.

This template is for Small Bars to use in order to create their own 'Handbook', which would store the crucial details needed to diffuse the impact upon the services provided by the Bar in the event of an unpredicted staff absence.

Things to note when creating a Handbook:

What to include in your Handbook: The recommendation is for a Handbook to include information which would be most needed and relevant to keep the Bar running for an interim period. Important information such as contracts, bylaws, staff and leadership contact information and passwords would be accessible. The information contained within should be focused on specific details needed within the first days/weeks of a Bar emergency event.

What not to include: The Handbook should not include more general details, such as Bar policies and procedures, board minutes, 'how to' guides etc. These documents are important to the functioning of the Association but aren't necessarily needed in an emergency. If a Handbook Section has additional policies and information, then identify the particular Section where these can be found.

Handbook must-haves: The Taskforce strongly recommends including:

- An Annual Calendar – what events, procedures, etc happen, when, why and how.
- Passwords/passcodes – any access that needs a password should be listed, such as computer access, photocopiers to the front door code of the building.
- Emergency Contacts for your staff and leadership, down to the landlord, if appropriate.

How to store our 'handbook'. - The Taskforce discussed two options: a traditional hard copy binder, or electronically. Things to think about:

Binder – Where do you keep it for ease of access? How many copies do you create and why? Perhaps store in a fireproof box, safe?

Electronically- Is it password protected and if yes, who knows the passwords?

Keeping it relevant and updated: Reviewing the Handbook is important to ensure information is relevant and kept updated. Some information, such as staff and emergency contacts, may need updating more often than others.

Who has access and why: Depending on the type of handbook created, think about where/how people will access the information. Is a copy of the Handbook shared with the leadership? If stored electronically, are passwords changed periodically, and how will new passwords be shared, and with who?

Details appearing more than once; the Taskforce found that some information could appear in more than one Handbook Section. For example, passwords, which could all kept together in a ‘Password’ Section, but could appear in other Sections, for example passwords to the social medial platforms could appear in the Communications Section. This would be for individual Small Bars to decide what works best for them.

On the subject of Passwords: The Taskforce had much discussion about where to keep passwords, and we are undecided as to whether the Handbook would be the best place to store this detail. Our advice, however, is store password information so you (a) ensure it’s accessible in case of an emergency and (b) it’s current and always updated.

Handbook Template Sections

Section Title	Included in the Section
Affinity Programs	Member discounts, affinity partner contacts, contracts, and agreements.
Annual Calendar	Listing exactly what happens, when how and why.
Association Management System / Membership Database	Passwords, license/contract, contact details for IT support, sales etc.
Awards & Recognition	Criteria, past recipients, selection process, where awards are purchased, timeframe.
Board of Governors	Board Orientation; Annual Financial Reports; Nominating Committee; Operations Reports; Contact information for board members and other leadership.
CLE	Accreditation organizations and contact names; CLE reporting guidelines.
Committees & Sections Including Bar Programs	Contact names; leadership appointment processes.
Communications/ Marketing	Print Publication – printing contact details, deadlines, contracts. Digital – contact details, software platform. Editorial Calendar; Social Media Calendar. Social Media platforms, passwords.

Section Title	Included in the Section
	Email software, if different from AMS.
Community Outreach	Law Day; Wills for Heroes; Volunteer Day; Mock Trial.
Computers	Backup Process; Computer Inventory; Remote Access; List of Software; passwords; Email platforms; Tech Support.
Courts	Calendar, Clerks contact details; Inclement Weather Policies; Investiture/Swearing-In; Updates to Share with Members
Credit Card Processing	Processing Instructions; Refund Policy; Security; Vendor.
Diversity and Inclusion Initiatives	
Event Management	Caterers; Facility Contacts; Liquor Liability.
Ethics/Grievance Committee/Fee Dispute Resolution	
Financial	Accountant; Annual Review/Audit; Banking Information including check signing, bank resolutions. Budget; Credit Card details; Investment Policies; Treasurer’s Reports.
Foundation	Board; Bylaws; Financial Documents; Grants.
Governing Docs	Bylaws; Charter; Corporation Annual Report; 990 Tax Return. Tax ID Letter.
Judicial Polls	Process / policies; examples of past years.
Lawyer Referral Service	
Legal Advice Clinics	Debt Relief; Faith & Justice; Veterans.
Logos	Style Guides.
Media Contacts	
Membership Surveys	Examples of past surveys.
Memorials	
Non-Profit Program	
Office Equipment	Copier Information; Phone System provider and passcodes; Postage Machine; Printer; Office Supplies/Vendors.
Operations	Insurance Policies, renewal dates and contacts; Landlord Lease and payment arrangements.
Passcodes / Passwords	Include usernames, any other relevant details.
Policies	Bar Leaders Handbook; Guidelines for Professional Courtesy & Conduct; social media; Mailing Lists Political Issues Policy; Non-Endorsement Policy.

Section Title	Included in the Section
Professional Resources	ABA Division of Bar Services Chamber; COMBA (Conference of Metropolitan Bar Associations); NABE – listserv; ASAE + state affiliation; ACLEA.
Publications	Example –internally produced and third-party subscriptions.
Public Resources	DV Handbook; LawLine Online. Legal Resource Guide.
Room Rental Process	Scheduling Room Reservations. Hosting Room Reservations.
Social Media	List of platforms used, how often to post, if hashtags are used, if a social media calendar is used.
Sponsorships – Legal Vendors	
Staff / HR	List of staff, contact details and emergency contacts.
Strategic Plans	Creation of Plan; Utilization of Plan.
Website	Providing/platform; contract, payment and renewal details; passwords.