

Final Report
NABE Programs and Services Taskforce
January 2018

The NABE Programs and Services Taskforce is pleased to submit its final recommendations to the Board.

Background:

The Taskforce was convened in June of 2017 to complete assessment of current and potential programs and services and develop plan for delivery. The following assumptions/actions were given to the group:

1. Identify target audiences and needs, including sections, committees, geographic location of members and any gaps identified by Goal 1.
2. Review and assess all current and potential educational offerings and delivery systems:
 - a. Type (How To's/High level programming; other training and meeting opportunities i.e. On-boarding and training of new bar professionals; existing meetings; Personal outreach; Regional/independent meetings; New CEO school that is regular/recurring)
 - b. Delivery Model (In person programming; webinars and other types of distance learning models)
 - c. Timing/location (and opportunities for coordinated scheduling of programming)
 - d. Differing audiences (state/local/specialty; new/seasoned; areas of expertise)
 - e. Identify and explore opportunities for collaboration internally and externally
3. Enhance methodologies to deliver content – live, virtual, other; also repurposing
4. Develop comprehensive education plan that encompasses all tracks of programming: midyear, annual, webinars, workshops, special interest programming; align to avoid repetition and conflict
 - a. Consider pricing/implementation of dynamic pricing and alternative pricing options including collaborative relationships
 - b. Evaluate existing scholarship guidelines

The Taskforce met from July – October and developed an initial set of recommendations for the Board to review at its November board meeting. Those recommendations were reviewed and several referred to board subcommittees.

Phase II of the Taskforce

Phase II of the Taskforce's work involved:

1. Elaborating on recommendation to redefine the program committee for all NABE programming so the board could better address impact, scope and be ready to implement by July 1;

2. Addressing remaining work highlighted in the Nov 2017 report:
 - a. Programs and services to better on board new bar professionals.
 - b. Other gaps in current service;
 - c. What more could be done to serve small bar professionals; and
3. Considering and defining what NABE could do to articulate the unique aspects of bar association work that distinguish it from other kinds of association or legal profession work and develop a set of recommendations that NABE could use going forward to better support and advocate for the bar association profession.

To address the last phase, the group was divided into 4 subcommittees:

Subcommittee 1 reviewed: Reconstituted Program Committee and sponsorships and scholarships in light of recommended changes.

Subcommittee 2 reviewed: Programs and Services to onboard new bar professionals, especially new executive directors who were former board members

Subcommittee 3 reviewed: Other specific content or services that is missing specifically programs and services to support small bar professionals and a final review of other existing structures (beyond annual and listserves) for duplication and opportunities for other approaches.

Subcommittee 4 reviewed: The role of NABE in advocating for the importance of qualified bar association professionals as a profession.

Before we present the subcommittee recommendations adopted by the Taskforce, it is worth noting that several themes emerged during the course of the Taskforce's work and continued to emerge in final discussions:

1. NABE finds itself in a unique moment in our history where we must broadly embrace the critical onboarding of new bar professionals in order to meet the changes happening in our profession and to help develop this new set of bar professionals entering our ranks;
2. All subcommittees identified the need for NABE to create additional tools and resources to support bar professionals beyond live programming;
3. There is a critical need to find more opportunities to engage our community to provide more opportunities for feedback and buy in for what we are collectively trying to accomplish;
4. Creating community, as we do in our own bars, is critical to our success. We need to think more creatively about how to create community for NABE now and to create community for new bar professionals; and
5. It is also worth noting that several subcommittee recommendations overlapped and merged, further emphasizing the need.

Recommendations re: the Program Committee:

- 1. New Name:** The Taskforce recommends the name of the Program Committee be changed to the Professional Development Committee.
- 2. New Formal Charge:** Assuming elimination of the midyear meeting, it is likely that the Annual meeting will have optimal attendance and that other section and committee sponsored educational programming may also afford greater participation and with that, greater challenges in content. The new proposed charge is as follows:

The Professional Development Committee plans, coordinates, and implements the educational programs and social functions at the NABE Annual Meeting. In addition the Committee will serve as a resource to all NABE Committees and Sections as they develop additional educational programming for the members of NABE. The newly constituted Committee provides the opportunity to facilitate communication between all NABE entities and to share the valuable discussions on learning opportunities to benefit all members of NABE.

Among its other focus areas, the Committee will be expected to ensure (or at a minimum address) diversity of all kinds – including age and level of experience – on panels, in speaker/moderator positions and other content platforms. This recommendation was addressed in the first set of Taskforce recommendations in November 2017.

- 3. New Committee Composition** The current Program Committee composition is a 3 year rotation of 4 members each via presidential appointment in certain categories. That makes 12 members plus a Chair, Vice Chair and Sponsorship Ex Officio totaling 15.

Being mindful of inclusive representation of our members' broadband, we would propose a similar 3 year rotation using standing committee and section representation, along with presidential appointments. A representative composition would include a member from the following NABE committees and sections who would serve on the Program Committee (or if the names changes, the Professional Development Committee).

- 1) Chief Staff Executives (combined with Small Bar)
- 2) Diversity Development
- 3) Membership
- 4) Communications
- 5) Administration & Finance
- 6) Government Relations
- 7) Website/Knowledge Management
- 8) Webinars
- 9-12) Four presidential appointments of which two will represent state bars and two will

represent local bars.

13) Sponsorship Chair or their designee - Ex Officio

14) Chair

15) Vice Chair

4. Open up pathways to the Professional Development Committee: Professional Development Committee appointment process should be more transparent and inclusive. We suggest that all NABE members be given the opportunity to apply or toss their hat into the ring for consideration particularly with the new committee's broader and more collaborative scope.

It should be noted that the Taskforce was not able to make further recommendations as the group somewhat hindered by not knowing specific board decisions on the midyear meeting and other programming issues. Therefore, it was not able to define other specifics with the appointment process for the Professional Development Committee, recommend other changes to the charge of others groups impacted by these changes nor address sponsorship and scholarship issues. Once charge and scope issues are finalized and adopted, the Taskforce suggests that the board engage impacted groups to collectively revise PD Committee charge, other entity charges and address related tasks i.e. sponsorship and scholarship issues.

Recommendations re: Programs and Services to Better Onboard new Bar Professionals.

The Taskforce spent a lot of time looking at onboarding bar professionals in 2 ways: 1) better ways to onboard members into the NABE organization and 2) needed tools and resources to onboard new bar professionals. Specifically, the Taskforce recommends:

5. Better Onboard New Members into NABE.

- a. **Examine Welcome Messages:** A small task force should be set up to examine the materials a new member receives upon joining the association. Do these materials contain the appropriate NABE branding, is the mode of delivery appropriate (email, mail, etc.), and is the message on how to take advantage of our services, attend our meetings, and join Sections clear? Ask the Communications Section Exec. Board to lead this project in conjunction with DBS.
- b. **NABE Newsletter Letter^{1*}:** Welcome new members in the general newsletter with a list a list of new joins (name & bar association) – include picture/headshot if can attain it.

^{1*} denotes ideas we understand the Membership Committee is working on. Some of these recommendations could easily be deployed to other entities if added to their charge.

- c. **Welcome New Members on NABE Social Media:** Great way to build our social media presence, include picture/headshot and tag new member's social media accounts and bar association.
- d. **Buddy/Mentor Program*:** Examine feasibility of a buddy/mentor being assigned to all new members for their first year of membership. NABE should create a tool kit/checklist on how to be a buddy. The buddy system could extend to the annual/other meetings. Special attention should be given to pair a new ED with a seasoned ED. "Veteran" buddies should be encouraged to periodically check in with their mentees after year 1 to further provide support and community after the initial year.
- e. **New Member Welcome at Midyear/Annual Meetings*:** Task the NABE membership committee with drafting a welcome time line for new members attending meetings. How are they welcomed (special welcome email a few days before meeting?). Is a buddy assigned, Tuesday dinner, special meet up at Tuesday night reception? Special table at Wednesday lunch? How can we make these new members welcome so they want to return for the next meeting?
- f. **Sections Should Welcome New Members:** Are Sections welcoming new members? Ask them to send short email that includes how to get involved in the section, join section listservs, future workshop dates and become active in section leadership and program planning is suggested. Message should come from Section leadership/chair.

6. Better Engage New and Newer Members to NABE:

- a. **Expand the concept of the buddy system to creating classes or cohorts:** For example, all new hire EDs or internal promotions to ED made in 2018 become NABE ED Class of 2018 – or ED18 (and the same for any other position or class of positions). This group then has the chance to tap into similarly situated professionals who will likely experience many of the same milestones around the same time for years to come. Creating that kind of connection right out of the gate can only serve to increase an individual's long-term NABE buy-in. This also gives NABE a chance to simply recognize those celebrating anniversaries. Envision the NABE annual meeting lunch: reading the names of those who just celebrated your first anniversary, or 10th. Provide a chance for NABE to celebrate the member at an annual lunch vs. business of the association.
- b. **Invite newer people to speak at programs and write articles to increase their buy into the organization:** Invite new members to become speakers at least once within first 2 years, whether as part of a panel of newer members to the even newer ones (Such as "Oh, How I Wish I Had Known That..." or "Once, Twice, Three Times the Mistakes I made in Year 1" or "Making the Transition from

Lawyer to ED” or some other topic.) The sooner a new member is invited to speak, the sooner she/he can feel like “one of the club.”

- c. **Modify Attendance Rosters:** In the attendee rosters distributed at annual/midyear meetings, consider asking people to submit headshots to include with their roster listing or some sort of simple directory.

7. Develop the following Tools and Resources to Help Onboard and Assist New Bar Professionals:

- a. **Continue to offer new ED Boot Camp:** Institutionalize the new ED Bootcamp that has been added to the March CSE Retreat.

- b. **Develop a Series of “The Bar as a Business” webinars/online chat groups:** These should focus on different aspects of running a bar – finance, accounting, buying insurance, human resource issues, working with boards, working with lawyers, making the switch from lawyer to ED, marketing, etc.). This would be like a Mini MBA for bar professionals. Members can get this through ASAE, so programs should be focused on issues specific to bar professionals. Archive copies of the event online for future use.

- c. **Develop Tools and Resources for small bars:** The Taskforce looked at what special tools and resources would benefit bar professionals who work in small bar associations. In addition to the series above, the Taskforce recommends surveying this specific group to identify specific needs. See Rec 3 below.

- d. **Develop Training on the Unique Qualifications to succeed as a Bar Professional:** The Taskforce also identified 5 unique qualifications and skills sets necessary for bar association professional success (or “5 Things a Bar Professional Needs to Know”). Specifically, those are:

1. How to manage and make the best use of a bar association’s resources – people, money, time, technology and good will. These may roughly be considered the technical skills/experiences such as finance/accounting, HR, communications, IT, facilities/ops, etc.
2. How to create, nurture and sustain relationships. These may be considered as interpersonal, networking, and partnership building skills/experiences.
3. How to curate and serve information and how to generate and transfer knowledge. These involve information science and adult learning/development skills/experiences.
4. How to understand the important and often unique needs, aims, desires of legal professionals and translate those into the structure, activities, metrics and values of the bar association. These are listening, managerial, organizational development and leadership skills/experiences.
5. A working understanding of the operation of (some aspect of) a membership-based service organization. These are all the skills/experiences as developed within a service context.

The Taskforce recommends designing and provide skills-based training for professionals at all levels across the “5 things a bar professional needs to know” spectrum.

e. Continue to develop leading-edge communications tools: NABE should explore, perhaps through a member survey, how well the current listservs and Sections serve job descriptions at modern bar associations. If needed, areas of focus served by listservs and Sections should be expanded or combined. For example, we should explore how well we serve members whose job is in law practice management, membership, CLE, and IT. This is a further refinement of November Report Recommendation 11.

Regarding these onboarding recommendations (both organizational and professional): The group also discussed whether 1 existing entity or a new entity could address these onboarding tools. It was suggested the scope impacts so many of our entities, no one body could or should be charged with these tasks.

Recommendations to Better Serve Small Bars:

The Taskforce also spent time discussing the needs of bar professionals working in small bar associations and was mindful of their different needs. Specifically, the Taskforce recommends:

8. Survey Small Bar Members: Ask the Small Bar Committee to survey members to assess special needs and interest in the recommendations that follow and add their suggestions:

A. Events:

1. Whether members would prefer regional conferences and/or a one-day add on before the NABE meeting convenes.
2. Providing webinars geared to small bars.
3. Conducting regular facilitated phone conferences with small bar staff.

B. Tools and resources:

1. Create a video onboarding program for new members
2. Host resources that would be helpful to small bars (ie. Resources such as guides, forms, templates)
3. Create a discussion group/list serve
4. Create a directory identifying the experience/expertise of each member to accompany 3.
5. Review options for an all-inclusive pricing option to be a member. This would enable small bars to have multiple staff be members despite not being able to attend conferences.

It was felt that the Small Bar Committee needed to participate in this process, help guide recommendations and assist with implementation of services. Once direct information is received from small bar professionals, a report back to the board can be made to help formulate more specific recommendations and/or tie them into existing recommendations.

Recommendations re: the Role of NABE in advocating for the importance of qualified bar association professionals as a profession:

At the November Board meeting, the Board asked the Taskforce to consider what NABE could do to help advocate and educate others about the unique skills bar professionals should and do possess. After careful consideration, the Taskforce recommends:

9. Adopt the following list as unique aspects of a bar association (as compared to other work in the legal profession):

- A. As a service organization a bar association is population-based rather than client-based and hence requires at times, and at various levels, that competing needs/desires/aims be balanced for the good of the organization and membership.
- B. Bar association work is entrepreneurial and requires some measure of risk-taking, even within those bars with regulatory functions.
- C. Bar associations must respond to regular changes in leadership with constancy and respect for leaders, those led, and the mission/charge.
- D. Bar associations (even voluntary) are in some measure public entities and as such have an ethical responsibility to the population within the profession represented by the bar (even those who are not members of the bar association), and to the public.
- E. Bar associations represent – whether actively or passively – the legal profession and as such their communications or silence about a matter pertaining to the profession (vs. a matter pertaining to a particular case or political issue) has standing with other social entities and with the public.
- F. Bar association staff members work to advance the interests of the legal profession; unlike attorneys, however, they are not self-employed, firm associates or partners, or specialized employees working in support of an organization with a mission unrelated to the legal profession. This unique relationship to the profession, this unique characteristic of a bar association, calls for unique approaches to the professional development of such employees.

As noted above, the group also identified “5 things a bar professional must know” (above) that has application in a variety of programs, services and resources. To further advocate for the bar association profession, the Taskforce also recommends:

10. Advocate for Bar Professionals and Professionalism by communicating to and through external stakeholders (namely the ABA, NCBP and NCBF) so these groups can begin to carry our message to their respective memberships and encourage a broader perspective of what constitutes the legal profession and how bar associations professionals might serve an expanding population.

11. Develop Base Level Position Descriptions for Bar Professionals: Consider developing and propagating base-level position descriptions and best practices for various kinds of bar association professionals to help establish norms for use in hiring and development.

Final Observations:

A couple of final points to make:

1. The Taskforce recognizes that these recommendations cannot simply be added to the list of association priorities. We appreciate that any new committee or effort will require more volunteer involvement and that the volunteer pool is full of already busy professionals.
2. The diverse structure and composition of the Taskforce was intended to liaise to major segments of the membership. We did our best to check in with members at the annual meeting in August and through other personal outreach. However, a more formal outreach to all levels of NABE leadership has not been done. Given the recommendations address providing greater opportunities to create community, perhaps these recommendations should be shared with all NABE chairs for their thoughts and to provide an opportunity for their valued input.
3. It should also be noted that the charge of the Taskforce allowed the group to consider a variety of engagement and community issues and how our services support community and engagement. While we did not intend to go beyond the charge given, some of this work certainly moves into Goal 2 of the Strategic Plan: Ensure NABE is accessible, affordable and inclusive.

We trust the Board will thoughtfully assess what additional NABE programs or services may need to shift in order to realize these recommendations. We appreciate the Board's courage to convene this Taskforce and begin these important discussions for our community. We stand ready to assist in the implementation and being champions of the effort.

Respectfully Submitted,

Ellen Miller-Sharp, San Diego County Bar Association, Chair.

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**Participated in Phase 2 of the Taskforce

***Only participated in Phase 1 of the work due to error

Taskforce on NABE Programs and Services Comprehensive List of Recommendations

(Recs 1-5, 10-16 addressed 11/17; Recs 6-9 and 17-23 to be addressed 1/18)

1. Change the name of the organization to the National Association of Bar Professionals.
2. Sunset the current “midyear” meeting that takes place before NCBP at ABA Annual Meeting
3. Broaden the “pre BLI” NABE Experience
4. Enhance the Annual Meeting
5. Reconstitute the “Program Committee” and give it a broader charge to ensure that more NABE members have access to educational content and mediums that work for them
6. Change Name of the Program Committee to the Professional Development Committee
7. Adopt the New Formal Charge for the Professional Development Committee
8. Adopt new Committee Composition for the Professional Development Committee
9. Open up pathways to the Professional Development Committee
10. Look for other synergistic opportunities in live programming to leverage resources and attract a broader spectrum of members
11. Create “Community” for bar professionals we aren’t currently serving:
 - Create groups or listserves for all members, regardless if there is an external group
 - Make members aware of any external groups that could help in their success
 - Maintain the well liked listserves but also explore facebook groups and other forms of e-communities and be willing to adapt.
 - Continue to develop leading-edge communications tools
12. Address what NABE does that contributes to a “cliquish” feeling in the organization and make systematic changes:
 - Maintain and enhance buddy system
 - Ensure committee assignments are diverse members and transparent

- All committee members should be contacted to feel engaged
 - Have all leaders message members using newer tools (like videos and podcast) to better personalize the association.
13. Address and reiterate the importance of diversity at all levels
- In event development
 - Committee appointments
14. Clarify NABE’s value proposition. Be clear about what NABE addresses (or doesn’t need to address)
15. Look for collaborations in content and programming with NCBP and ABA DBS to avoid duplication:
- Review and address what content needs to go where
 - Add content that is currently missing
 - Remove content that is not needed or contributes to confusion or that is covered by another organization
16. Simplify NABE Content offerings to avoid “organizational bleed” or confusion about what NABE is about
17. Better Onboard New Members into NABE:
- Examine Welcome Messages:
 - NABE Newsletter Letter^{2*}:
 - Welcome New Members on NABE Social Media:
 - Buddy/Mentor Program^{*}:
 - New Member Welcome at Midyear/Annual Meetings^{*}:
 - Sections Should Welcome New Members:
18. Better Engage New and Newer Members to NABE:
- Expand the concept of the buddy system to creating classes or cohorts:
 - Invite newer people to speak at programs and write articles to increase their buy into the organization
 - Modify Attendance Rosters to include headshots

^{2*} denotes ideas we understand the Membership Committee is working on. Some of these recommendations could easily be deployed to other entities if added to their charge.

19. Develop the following Tools and Resources to Help Onboard and Assist New Bar Professionals:
 - Continue to offer new ED Boot Camp
 - Develop a Series of “The Bar as a Business” webinars/online chat groups
 - Develop Tools and Resources for small bars
 - Develop Training on the Unique Qualifications to succeed as a Bar Professional:
20. Survey Small Bar Members about interests and needs re: events and resources
21. Adopt the list of unique aspects of a bar association (as compared to other work in the legal profession):
 - As a service organization a bar association is population-based rather than client-based and hence requires at times, and at various levels, that competing needs/desires/aims be balanced for the good of the organization and membership.
 - Bar association work is entrepreneurial and requires some measure of risk-taking, even within those bars with regulatory functions.
 - Bar associations must respond to regular changes in leadership with constancy and respect for leaders, those led, and the mission/charge.
 - Bar associations (even voluntary) are in some measure public entities and as such have an ethical responsibility to the population within the profession represented by the bar (even those who are not members of the bar association), and to the public.
 - Bar associations represent – whether actively or passively – the legal profession and as such their communications or silence about a matter pertaining to the profession (vs. a matter pertaining to a particular case or political issue) has standing with other social entities and with the public.
 - Bar association staff members work to advance the interests of the legal profession; unlike attorneys, however, they are not self-employed, firm associates or partners, or specialized employees working in support of an organization with a mission unrelated to the legal profession. This unique relationship to the profession, this unique characteristic of a bar association, calls for unique approaches to the professional development of such employees.
22. Better advocate for Bar Professionals and Professionalism by communicating specific messaging to and through external stakeholders (namely the ABA, NCBP and NCBF)
23. Consider Developing Base Level Position Descriptions for Bar Professionals