The First Eighteen Months: An Onboarding Guide for Success as A Bar Association CSE

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How to Use Your First Eighteen Months: An Onboarding and Integration Guide

This guide is intended to help you be successful during your first year and a half as the chief staff executive (CSE) of a bar association. Whether you are experienced at being in charge or new to the CSE role, the first year has been described as "drinking from a firehose." NABE and your colleagues are here to support you to #naBEMore. We will smooth your journey by connecting you with people and knowledge resources that can help. Make sure that you visit your profile and tell us about yourself.

Not all recommended tasks are pertinent to every situation. It depends on the size and complexity of your organization. Some tasks will require your attention earlier or later, depending on when you begin your job relative to the bar's program, governance, and financial cycles. While we have categorized the tasks, few of them are exclusively one thing or another.

- **Administrative Tasks** address paperwork and process.
- **Management Tasks** involve staff and volunteers, and how the work gets done.
- **Governance Tasks** are those that include the board and other governing bodies and the exercise of their oversight and fiduciary responsibilities. Governance is both policy and process.
- **Relationship-building Tasks** focus on internal and external stakeholders.
- **Self-care Tasks** help you to succeed by avoiding burnout and reducing stress.

Successful transitions are the result of traversing the cultural, political, and technical aspects of your leadership role.

A reading list, policy list, and glossary are linked in this report.

Finally, be sure to follow NABE and the ABA Division for Bar Services on social media for the latest news and updates.

www.nabenet.org    www.americanbar.org/groups/bar_services/

@NAB_E News    @ABABarServices
Week One

Welcome to your first weeks as the executive director of your bar organization. Your first days will set the tone for your leadership and communication styles. Now you will begin to integrate the knowledge that you gained during the recruitment process into a bigger, more in-depth picture of the association.

1. **Relationship-building Task:** Meet the Staff. Meet all of the staff who are present and accounted for on day one of your new adventure. If you have a large staff host a town hall and arrange for an introduction from the president or president-elect. Don’t make promises from the seemingly minor to the revolutionary.

2. **Administrative Task:** Fill out the paperwork. It is important to get paid. It also is your first exposure to the process and procedures related to human resources management. Ask questions. Take notes. If you have a human resources manager or point person, ask to work through the process with him or her to experience it both from their perspective and onboarding employee. If you do not have an human resource professional on staff, consider reviewing the onboard process with labor counsel to ensure you are observing current best practices.

3. **Administrative Task:** Review scheduling and calendaring norms. Are drop-ins okay? Are there days of the week or times of the day designated "no meetings"? Is there a shared staff calendar? Is there a calendar of the association events and critical deadlines? If not, request staff to compile a comprehensive one.

4. **Management Task:** Review the organizational chart and determine how well it reflects reality.

5. **Administrative Task:** Understand building security and parking. Obtain keys and access codes.

6. **Relationship-building Task:** Be visible. Engage in building relationships by walking around. Visit someone in their office rather than sending an email. Visit the staff kitchen or lunchroom.

7. **Administrative Task:** Settle into your office. Make yourself comfortable. Order your favorite post-it-notes and learn how to use the office coffee maker. Understand the current Board and Executive files/records system(s).

8. **Management Task:** Request Departmental Program Assessments from Directors. Ask for assessments of what is working well, what needs attention, and any pending decisions or issues on the horizon that will require your input and consideration. Ask managers to identify their challenges and opportunities.
9. **Management Task:** Schedule one-one meetings with all department heads or if you have a manageable staff size with each member of your staff.
Listen. Ask questions. Identify events that you should attend. This effort is about information and insight gathering not problem-solving unless there is an urgent matter requiring a decision.

10. **Relationship-building Task:** Request a list of top 10-20 stakeholders from your officers, board members, and senior staff.
These may include vendor partners and sponsors, managing partners of the community’s largest law firms, judicial officers, audit firm, law school deans, and bar association colleagues. Developing relationships and building support for your leadership is very important. Understanding expectations and aligning them should be a priority.

11. **Management Task:** Set times for regular staff or direct reports meetings.

12. **Relationship-building Task:** Familiarize yourself with the acronym soup of association management, the legal profession, and bar associations. This glossary will help you.

13. **Governance Task:** Meet with the officers.
Identify their goals and expectations for the short term. Share your onboarding plan with them and ask for introductions to key stakeholders. Clarify expectations for governance: scheduling, agenda preparation, minute taking, and regular communications. Ask about written and unwritten Board policies and procedures.

14. **Relationship-building Task:** Calendar upcoming events that you should attend. Consult with officers, board members, and senior staff to prioritize events.

15. **Administrative Task:** Execute corporate resolution.
Complete paperwork for signing contracts, corporate credit card, and check signing authority, as appropriate to the bar’s policy and procedures.

16. **Administrative Task:** Understand the travel reimbursement policy.

**Things to Read:**
- Bylaws
- Court Rules governing the Bar
- CLE and other reporting regulations
- Minutes from board meetings for the last year
- Financial statements
- Budget reports
- Audit reports
- Employee Policy Manual
- Board policies
- Leadership briefing materials
Weeks Two - Six

1. **Management Task:** Prepare your elevator speech for your conversations with stakeholders. Why did you want the job as executive director? What opportunities have you identified?

2. **Management Task:** Write an introductory column for the newsletter or hold an interview with the newsletter/journal editor and local legal media.

3. **Administrative Task:** Review policy and operational manuals.

4. **Relationship-building Task:** Introduce yourself to the National Association of Bar Executives CSE Community by creating a login password to your NABE account.

5. **Governance Task:** Review the policy checklist. Identify what may be missing or requiring attention and set priorities in consultation with appropriate staff such as the Human Resources Director, Finance Director and/or General Counsel.

6. **Self-Care Task:** Identify and register for upcoming professional development events. Plan to attend the National Association of Bar Executives (NABE) Annual and Midyear meetings and Chief Staff Executives Retreat [link to calendar document]. If you are a local bar executive, your state may host a bar professionals’ group and a statewide bar leaders conference.

7. **Governance Task:** Meet with board members. Scheduling board member meetings will depend on the size of the board and the geographical reach of your organization. If you are a statewide bar association with a 50-member board, individual meetings may not be practical. But there are alternatives. Consider video calls using Skype or Zoom.

   If there is a board meeting within a month of your start date, you might want to forgo the individual in person meetings and script an introductory phone call.

8. **Management Task:** Determine some early wins that align with both board and operational priorities.

9. **Relationship-building Task:** Return your NABE docent’s phone call and set-up a conference call. Your NABE docent is an experienced chief staff executive available to help you navigate your first 18-months serving as a sounding board, confidant, and guide.
10. **Administrative Task:** Compile—or delegate—a list of contracts and insurance policies and their expiration dates. Check for those that auto-renew and set a reminder for review before the notification date.

11. **Management Task:** Meet with outside consultants to whom functions -- such as payroll, bookkeeping, web development, human resources, or IT-- are outsourced.

12. **Relationship-building Task:** Schedule and meet with external stakeholders in person or by telephone.

13. **Management Task:** Assess membership trends, demographic information, and chart dues billing and renewal cycles.

14. **Administrative Task:** Develop a list of emergency contact information (staff, building security information, banking, and insurance resources) and store off-site and online.

15. **Administrative Task:** Determine data security and backup procedures, including cyber insurance.

16. **Governance Task:** Work with the president to develop agenda and materials for your first board meeting.

17. **Relationship-building Task:** Plan and invite members to meet and greet.

18. **Management Task:** Attend departmental staff meetings.

19. **Management Task:** Learn about the current fiscal (and operational?) audit process. Meet with auditor(s) and Audit/Finance Committee representative(s) as appropriate.

**Things to Read:**
- Membership Survey Results
- Performance Reviews of Direct Reports
- Strategic Plan
- Operational Plan(s)
- Last several issues of printed newsletter or journal
- Website
- Internal Disaster Recovery Plan
- Disaster Plan (Procedures in case of a mass disaster such as an airplane crash or natural disaster that impacts members and community.)
- Communications Plan
- Policy on responding to unwarranted criticism of judges
- New Bar President and New Bar Board Member published by the ABA Division for Bar Service
Weeks Seven - Twelve

1. **Management and Governance Task:** Determine your organization’s status and lifecycle position. Does it require a turnaround? Turnarounds require swift and decisive action. They could be marked by dwindling membership, faltering finances, stale programming, low-staff moral and a disengaged board. Realignments are necessary when outcomes are okay, but there are signs that things are getting worse. Change is more deliberate in realignments and requires building allies and support. If everything seems tip-top and running smoothly, you are sustaining success. You may be facing different imperatives in different functions of the organization. Finances may need a turnaround while programming needs realignment. Assess by functional area.

2. **Administration and Governance Task:** Check on the status of regulatory filing compliance such as the 990, state non-for-profit registration, lobbying registration, OSHA, sales tax, etc.

3. **Management Task:** Attend a CLE program and other routine events. Get a feel for programming and use the opportunity to meet members.

4. **Management Task:** Talk to the receptionist. What do people call about? What frustrates members when they call?

5. **Governance Task:** Meet weekly with the President to review project status and your onboarding progress.

6. **Relationship-building Task:** Identify an informal group of internal and external advisors who can offer technical, cultural, or political insight. Look beyond your direct reports and your officers. These are the folks that can give you a reality check and help you to negotiate changes. In the process, make sure to be inclusive of longtime staff members.

7. **Administrative Task:** Analyze capital expenditure needs for the bar building or office space. Are there deferred maintenance issues that need to be addressed? When does the lease expire?

8. **Governance Task:** Prepare for your first board meeting, include a written executive director’s report to be included with the board background packet. Highlight key meetings and accomplishments.
9. **Management Task:** Assess your learning agenda. After reviewing all the essential documents determine your learning agenda: What else do you need to know? Who has the information that you need?

10. **Management Task:** Further determine how things work. Explore the mechanics of significant projects. How does the renewal process work? How is a CLE program planned and executed? When who and how is the legislative agenda set?

11. **Management Task:** Attend departmental staff meetings.

12. **Relationship-building Task:** Continue to meet with external stakeholders and identify key points of contention and support for the association.

13. **Governance Task:** Familiarize yourself with best practices in bar board governance. [link to DBS Governance Resources]

14. **Management Task:** Read legislative agenda materials to familiarize yourself with the players and process. Meet with outside legislative counsel, as appropriate.

15. **Management Task:** Examine the performance review process and methods for determining salary increases.

16. **Management Task:** Identify points of internal conflict among staff members and organizational entities.

17. **Self-Care Task:** Check in with your NABE docent.

18. **Governance Task:** Meet with the executive committee or designated entity to establish your performance goals.

19. **Management Task:** Determine modes of staff recognition and celebration. Cake for birthdays? Annual outings? Summer hours?

**Things to Read:**
- 990s (three-years)
- Committee charges
- Section charges
- Job descriptions
- Lease
- Association-Foundation MOU
- NABE Compensation & Benefits Survey (published every two years)
- ABA Division for Bar Services (DBS) Annual Benchmark Survey (customized reports may be requested from the DBS)
Weeks Thirteen - Twenty-Four

1. **Management Task:** Share your organizational assessment with leadership and appropriate staff: governance, human resources, and financial policies in need of revision; staff matters requiring attention; and those things that are running well.

2. **Governance Task:** Refine your staff report to the board and consider developing a Key Performance Indicator document (KPI) to present the board with a monthly or quarterly snapshot.

3. **Administrative Task:** Review staff benefits package, including health insurance.

4. **Management Task:** Review staff professional development plans, and opportunities. Participate in NABE Classroom events.

5. **Management Task:** Understand the technology infrastructure and the plan for replacing equipment.

6. **Relationship-building and Management Task:** Attend your regional state bar conference, State Bar Local Bar Leadership Conference, or the Conference of Metropolitan Bar Association Annual Meeting.

7. **Administrative, Management, and Governance Task:** Revise or create prioritized staff, financial, or governance policies. In revising governance policies work with a board committee or task force.

8. **Self-care Task:** Close the office early before a holiday weekend or for no reason at all.

9. **Management Task:** Assess staff skillsets against identified organizational needs. Begin the realignment process.

10. **Management Task:** Review existing documentation “inventory” and updating/revision processes and schedules.

**Things to Read:**

- NABE Bulletin
- NABE News
- *Bar Leader Magazine and Bar Leader Weekly*

*electronic
Weeks Twenty-Five - Thirty-Six

1. **Governance Task:** Hold a six-month check-in with your officers on your progress towards your goals and your onboarding plan. Recalibrate as necessary.

2. **Governance Task:** Review and work with staff to revise board orientation materials. Coordinate and schedule orientation.

3. **Management Task:** Evaluate staff wellness initiatives.

4. **Self-Care Task:** Schedule a vacation. Avoid burnout.

5. **Management Task:** Host a staff retreat. Develop an agenda for creating an operational plan based on your assessment. Create some space at the retreat to continue to build your team.

6. **Administrative Task:** Begin the budget process. Determine your role vis-à-vis your finance staff, treasurer, and the Finance Committee. Identify a pool for staff compensation and bonuses.

7. **Management Task:** Monitor program processes and begin to guide and lead change.

8. **Relationship-building, Governance and Self-Care Task:** Plan to attend the CSE Retreat and the ABA Bar Leadership Institute with your president-elect (March). These are must-do events and serve as both an orientation and an opportunity to build your network.

9. **Governance Task:** Shephard the Nominating or Election process. Ensure compliance with notification dates.

10. **Self-Care Task:** Establish your “kitchen cabinet” of NABE colleagues to turn to for substantive advice and information sharing.

Week Thirty-Seven – Fifty-Two

1. **Management Task:** Conduct performance reviews and determine raises and bonuses.

2. **Governance Task:** Perform a self-evaluation in advance of your review by the Executive Committee or the Human Resources/Personnel Committee.

3. **Management Task:** Meet with those doing your performance review and set goals for year two.

4. **Self-Care Task:** Celebrate your first year.
5. Management Task: Set your personal goals for year two.


7. Management Task: Engage in operational planning with your team.

**Weeks Fifty-Three - Seventy-Eight**

1. Management Task: Reassess and update organizational alignment.

2. Governance Task: Consider formal updating of the strategic plan.

3. Relationship-building Task: Meet with new board members.

4. Administrative Task: Respond to NABE Compensation and Benefits Survey request and ABA Division for Bar Services Benchmark Survey response request.

5. Management Task: Assess ongoing programs and activities.

6. Self-Care Task: Celebrate achievement of goals. Be sure to communicate your success to bar leaders.

7. Self-Care Task: Update your perpetual planning calendar and/or checklist and evaluate it for what is realistic. Make sure you have allowed time for outside interests.

8. Relationship-building Task: Consider how you can “give back” to your colleagues:
   - What can you share from your first-year (plus) experience?
   - Who can you mentor?
   - Consider how you can do this and more through NABE volunteer involvement

9. Governance Task: Establish or update the board development plan.

10. Governance Task: Conduct a Board Assessment and Evaluation to determine how the board can improve its work.
Things to Read

Bylaws
Court Rules governing the Bar
CLE and other reporting regulations
Minutes from board meetings for the last year
Financial statements
Budget reports
Audit reports
Employee Policy Manual
Board policies
Leadership briefing materials
Section and Committee chair orientation materials
*The First 90 Days* by Michael D. Watkins
Foundation and Association Annual Reports
Membership Survey Results
Performance Reviews of Direct Reports
Strategic Plan
Operational Plan(s)
Last several issues of printed newsletter or journal
Website
Internal Disaster Recovery Plan
Disaster Plan (Procedures in case of a mass disaster such as an airplane crash or natural disaster that impacts members and the community.)
Communications Plan
Policy on responding to unwarranted criticism of judges
*New Bar President and New Bar Board Member* published by the ABA Division for Bar Service
990s (three-years)
Committee charges
Section charges
Job descriptions
Lease
Association-Foundation MOU
*NABE Compensation & Benefits Survey* (published every two years)
ABA Division for Bar Services (DBS) *Annual Benchmark Survey* (customized reports may be requested from the DBS)
*NABE Bulletin* (you are automatically enrolled as a NABE member)
*NABE News* (you are automatically enrolled as a NABE member)
*Bar Leader Magazine and Bar Leader Weekly*
The First 18-Months Policy Checklist

- Bylaws
- Certificate of Incorporation, Resolution
- Conflict of Interest
- Confidentiality
- Court Rules applied to regulation
- Internal Financial Controls
- Conduct Standards
- Sexual Harassment
- Whistle Blower
- Antitrust Avoidance Statement
- Risk Management (D&O Insurance)
- Statement of Jurisdiction or Public Position Guidelines (apparent authority)
- Records Retention
- Social Media Policy
- Editorial Policy
- Advertising Policy
- PCI Compliance Procedures
- Employee Handbook
  - Vacation/Administrative Leave/PTO
  - Non-discrimination/EEOC compliance
  - Holidays
  - Salary administration
Glossary\(^1\) of the Alphabet Soup of Bar Acronyms

Bar-related Membership Organizations for Staff Professionals and Volunteer Leaders

**NABE—National Association of Bar Executives.** NABE is the membership organization for professional staff of bar associations and law-related organizations, promoting and supporting excellence and professionalism among bar executives. In addition to its biannual meetings during the ABA Midyear and Annual Meetings, NABE presents section-sponsored workshops for staff specialists that supplement general educational programs. A retreat for chief staff executives is held each March prior to the ABA Bar Leadership Institute. Membership is on an individual basis, with discounts for multiple members of a bar association. Staffed by the ABA Division for Bar Services.

**NCBP—National Conference of Bar Presidents.** The membership organization for present, future, and past bar presidents, NCBP’s primary purpose is education. Through its biannual meetings in conjunction with the ABA Midyear and Annual Meetings, NCBP provides high-quality programming on issues of concern to bar leaders at state, local, and national bar associations. Membership is on an organizational as well as an individual basis. Staffed by the ABA Division for Bar Services.

**NCBF—National Conference of Bar Foundations.** NCBF provides a medium for professional staff, officers, and board members of bar foundations to exchange ideas and information related to best practices in the area of bar foundation management, fundraising, and public service programming. NCBF meets in conjunction with both NABE and NCBP at ABA Midyear and Annual Meetings. Membership is on an organizational as well as an individual basis. Staffed by the ABA Division for Bar Services.

**MBC—Metropolitan Bar Caucus.** MBC supplements the educational programming offered by NCBP, with a specific focus on metro bar matters. Membership is by organization and the caucus welcomes both executives and officers of bar associations with membership in excess of 1,500. Targeted programming is offered on Friday afternoons during Midyear and Annual Meetings of NCBP.

**ACLEA—Association for Continuing Legal Education**
ACLEA is comprised members who represent bar association, academic, and commercial providers of continuing legal education. There are both individual and organizational membership options. ACLEA sponsors a Midyear and an Annual meeting with interim online learning opportunities. It is a resource for CLE rules and regulations.

**NOBC—National Organization of Bar Counsel**
NOBC is of legal professionals whose members enforce ethics rules that regulate the professional conduct of lawyers who practice law in the United States, Canada, The United Kingdom and other countries around the world. It meets in conjunction with the

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\(^1\) Courtesy of the ABA Division for Bar Services
ABA Midyear and Annual meetings. NOBC also takes advocacy positions on matters relating to the regulation of the practice of law and facilitates the submission of briefing on litigated issues of nationwide importance through its Amicus Committee.

**National Minority Bar Associations**

Next, there are several nationwide bar associations that represent lawyers of specific racial, ethnic, and cultural backgrounds. They are:

**HNBA**—**Hispanic National Bar Association.** HNBA represents the interests of more than 25,000 Hispanic American lawyers, judges, law professors, and law students in the United States and Puerto Rico. Its primary objectives are to increase professional opportunities for Hispanics in the legal profession and address issues of concern to the national Hispanic community.

**NAPABA**—**National Asian Pacific American Bar Association.** The only national association of Asian Pacific American lawyers, NAPABA advocates for the legal needs and interests of the APA community. It provides a national network for its members and affiliates, representing over 40,000 attorneys in 85 local APA bar associations.

**NBA**—**National Bar Association.** The oldest and largest national association of predominately African American lawyers and judges, the NBA represents a professional network of more than 20,000 lawyers, judges, educators, and law students. It has affiliate chapters throughout the United States and affiliations in Canada, the United Kingdom, Africa, and the Caribbean.

**NNABA**—**National Native American Bar Association.** The national association for Native American attorneys, judges, law professors, and law students, NNABA promotes issues important to the Native American community and works to improve professional opportunities for Native American lawyers.

**ABA-related Groups**

There are certain groups within the structure of the ABA that are of interest to leaders of other bar associations. These include:

**SCOBAS**—**Standing Committee on Bar Activities and Services.** The Standing Committee serves as the “eyes and ears” of the ABA in its relations with state and local bar associations and foundations. The committee works closely with the Division for Bar Services in its liaison efforts and, among its responsibilities, sponsors the annual Bar Leadership Institute and the ABA Partnership Awards Program.

**NCSBA**—**National Caucus of State Bar Associations.** A nonprofit unincorporated association, the National Caucus is comprised of the state bar associations of the 50 states and the District of Columbia, the territorial bar associations with representation in the ABA
House of Delegates, and the six regional state bar conferences. Each member organization has two delegates to the Caucus and meets during the Midyear and Annual Meetings of the ABA. The Caucus provides an educational forum for sharing information regarding items of interest to state bar associations that will be considered by the ABA House of Delegates. On occasion, it may take positions on issues that may be considered by the House.

**Regional Conferences and Organizations**

There are also organizations that give bar leaders from specific regions of the country a chance to get together and share ideas. They are:

**COMBA—Conference of Metropolitan Bar Associations.** The only local bar regional conference, COMBA grew out of joint meetings of local bar executives from Ohio and Michigan and expanded to include officers and executives from metro bars throughout the county. COMBA holds an annual conference in the fall for officers and CSEs of participating bar associations.

**NEBA—New England Bar Association.** Composed of bar leaders from the six New England states (Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island, and Vermont), NEBA’s board meets three or four times during the year and holds an annual meeting in the fall. Formed in 1969, NEBA tracks federal legislation and takes joint stands on issues that the six states have in common.

**MABC—Mid-Atlantic Bar Conference.** Six state bars (Delaware, District of Columbia, Maryland, New Jersey, New York, and Pennsylvania) banded together in 1979 to form the newest of the state bar regional conferences. Besides its annual conference in the fall, the group holds a breakfast meeting at ABA Midyear and Annual Meetings to review reports before the ABA House of Delegates.

**SCBP—Southern Conference of Bar Presidents.** The largest of the state bar regional conferences, with 21 bars from 17 states (Alabama, Arkansas, Florida, Georgia, Kansas, Kentucky, Louisiana, Maryland, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia), Puerto Rico, and the Virgin Islands, SCBP conducts an annual meeting as well as business meetings at the ABA Midyear and Annual Meetings. Established in its current format in 1969, SCBP takes stands on issues and occasionally adopts resolutions in addition to providing educational programming.
WSBC—Western States Bar Conference. Established in 1949, the WSBC is the oldest of the regional state bar conferences and has a membership of 17 state and territorial bars (Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, and the Northern Marianas Islands). It meets once a year after the ABA Midyear Meeting. A standard feature of its annual meeting is the roll call of the states.

Great Rivers Bar Leaders Conference. Formerly known as the Midwest Regional Conference of State Bar Leaders, the Great Rivers Conference formed in 1972 and is composed of eight state bars (Illinois, Iowa, Indiana, Michigan, Minnesota, Nebraska, Ohio, and Wisconsin). The Conference sponsors an annual meeting and informal dinners at ABA Midyear and Annual Meetings.

Jackrabbit Bar Conference. The Jackrabbit bar comprises eight member states (Idaho, Montana, Nevada, New Mexico, North Dakota, South Dakota, Utah, and Wyoming). It is the least formal of the state bar regional conferences, meeting once a year, generally in early June in a resort location.
To: Missouri Bar Board of Governors  
From: Sebrina Barrett, Executive Director  
Re: End-of-Year Report  
Date: November 21, 2014

It has been a great year, focused on being relevant to members and the public and working under the overall theme that The Missouri Bar is “Here to Help”.

I am providing this report to summarize our accomplishments and to identify the opportunities and challenges that we will experience in 2015. I am grateful for the continued support of tremendous bar leaders and the hard work by the Bar’s dedicated staff.

**Accomplishments**

**Missouri Bar Programs & Initiatives**
- Passage of the *Criminal Code* rewrite, along with three other bar-sponsored bills
- Significant advancement of *Relevance* initiatives, including expanding Mini Law School to Columbia and Kansas City; providing a prison civics program; launching a new public website (missourilawyershelp.org); improving JPE publication efforts (yourmissourijudges.org); expanding the practical skills podcast library for members; updating the member website; and adding new member benefits.
- Approval of and launch of *committee restructuring* initiative
- New *Dialogue* format in e-newsletter form
- Launch of *Veterans Initiatives*, including several clinics across the state and a Lawyer Referral Discount program
- Completed *database programming* to bar fee process as required by the bar fee increase
- Work under way to study *expungement* and develop bar drafted legislation
- Continued *building relationships* with *state and federal legislature* through second Legislative Day; regional events; committee events and visits to Washington D.C.

**Board Governance/Bar Leadership**
- Reformatted *Board Orientation* program
- New *Conflict of Interest* policy
- New *Past Presidents/Supreme Court* dinner
- *Bar Foundation Audit* RFP

**Personnel Management**
- Revised *Employee Handbook*
- Created employee *job descriptions*
- Instituted “all staff” meetings
- Enhanced *security measures*, including routine re-set of staff computer passwords; development of incident breach policy; employing automatic computer lock settings
• Hired Media Writer to assist with media relations, social media and other communications strategies to members and the public, Relevance initiatives, among other projects
• New Conflict of Interest policy
• Document Retention: eliminated need for off-site storage; developing document retention policy; working toward electronic document retention
• Workplace safety: emergency procedures in the event of fire, tornado, etc., added to the employee handbook; purchase of defibrillators; new keypad entry system

Opportunities/Challenges
• Plan for the future of the print shop
• Finalize evaluation of the defined benefit investment
• Continue to monitor financial status of CLE Program and Publication departments
• Continue to implement the new committee structure
• Implement Document Retention Policy
• Carry out and evaluate the effectiveness of the pilot revisions to the legislation review process
• Produce a successful diversity summit
• Continue to monitor threats to the unified bar and the non-partisan court plan
• Further expansion of Mini Law school to Springfield and four additional communities through a pilot project with University of Missouri Extension
• Celebrating 75th Anniversary of The Missouri Plan through the Speakers Bureau and a traveling exhibit developed in partnership with the Missouri Humanities Council