

NABE

**Tools & Techniques
Questions & Answers
for the Bar Association Professional of Tomorrow
Chicago, Illinois
February 8, 2006**

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#1

Bar Association Decision Making Model

1. Define
2. Analyze
3. Assume/Forecast
4. Options
5. Decide

#2

Bar Association Program and Service Evaluation Matrix

This matrix was designed to assist associations in a critical evaluation of their programs, services and activities. The numerical assessment is intended to reduce bias and emotions. The “forced choice” approach eliminates the tendency to give high ratings across the board.

Program, service, product or activity	Relatedness to mission	Life cycle position	% of members use	Financial results or potential	Effective use of staff & volunteer time	Available from other sources?	Would we start today?	Total

1. List all association programs, products, services and activities in the first vertical column. (Sometimes just putting this list together will be illuminating.) Larger, more complex associations may have to do this by department.
2. Total the number of all programs, services, products and activities. Divide the total by 5 for your “rating quota”

For example, if you have 30 programs and services listed, you divide by 5 and your rating quota is 6. The quota limits the number of programs you can give high rankings, and forces you to give lower rankings.

3. Under each vertical column heading, you should assign a number from 1 to 5 to each program or service. A “5” is the highest or most favorable rating and a “1” the lowest. However, you must assign ratings limited by your rating quota.

In the example above with 30 programs and services, you can only give 6 programs a “5” rating, 6 programs a “4” rating and so on. (Yes, 6 programs must be given a “1”) I recommend that you fill in your 6 “5s” first, then the lowest 6 “1s” Then go back and fill in your 6 “4s”, then go back and fill in the 6 “2s”

4. Total the ratings horizontally and rank them from the highest total to the lowest. (Use Excel)
5. Ask yourself why you are continuing the programs and services in the lower 1/3 of the evaluation.

Key Questions to Ask When Evaluating Bar Association Programs, Service and Activities

1. Knowing what we know now, would we really start this program, activity or service today?
2. If this program or service is readily available elsewhere, why are we offering it?
3. If we devoted the resources required to support this activity to another initiative, would our members be better served?
4. Is there an articulated and valid reason for subsidizing this activity?
5. Will we still be offering this program, activity or service in 5 to 10 years?
6. Do we allocate all costs to this program or activity? If we did, how likely would we be to continue it?

Tips on the Abandonment Process

1. Recognize the emotional and political factors
2. Use data; have the facts
3. Engage key stakeholders early and often
4. Graphically demonstrate what the reallocated resources can do

#3

Bar Association Continuity Matrix

Objective	2005/2006 President X	2006/2007 President Y	2007/2008 President Z
Objective #1			
Objective #2			
Objective #3			

#4

Bar Association Member Survey Tips & Template

Tips for Membership Surveys

- A. Use an email-delivered, online survey system like Zoomerang or Survey Monkey.
- B. Keep the questionnaire short. Try for 5-6 questions, 10 tops, mostly multiple choice or “check the box.” Weed out questions that would be “Nice to know” vs. actionable information.
- C. Tell them in the email message that there are “only 6 questions and it should take you no more than 2-3 minutes to complete.”
- D. Don’t ask them what the Bar should do for them.
- E. Consider surveying random samples vs. the entire membership of the Bar.
- F. Use consistent questions to track trends from year to year.
- G. Use special 2-3 question, “30 second” surveys on specific issues or programs.

The following questions are core member satisfaction survey questions.

1. Please rate your overall satisfaction with your membership in the XYZ bar association: (Scale of 1-5; 1 = Not at all satisfied, 3 = Satisfied, 5 = Very Satisfied)
2. What is the primary reason you give the Bar this rating? (Please be concise; use a word or short phrase)
3. Please rate the value of the following bar services and activities: (Scale of 1-5; 1 = Not at all valuable, 3 = Valuable, 5 = Very Valuable)

CLE

Newsletter

Magazine

Website

Section

4. Please rate the impact of the following on you as an attorney: (Scale of 1-5; 1 = Not at all valuable, 3 = Valuable, 5 = Very Valuable)

Issue A

Issue B

Issue C

Issue D

Issue E

5. Please rank the following in terms of importance for the Bar to address:

Issue A

Issue B

Issue C

6. If you had the opportunity to speak confidentially to the leadership of the XYZ bar association, what advice or suggestions would you offer them?

7. Demographic profile question

#5

Bar Association Board Self-Assessment Instrument

1. Please rate the overall performance of the XYZ Bar Association's Board of Directors in governing the association:
2. What is the primary reason you give the Board that rating?
3. What are the Boards strengths? (Please be concise; use a word or short phrase)
4. Where is the Board weak or in need of improvement? (Please be concise; use a word or short phrase)
5. Please rate the Board along the following dimensions: (Scale of 1-5, 1 = Poor, 3 = Good, 5 = Excellent)

Preparation for Board meetings

Board meeting productivity

Direction to Committees and Task Forces

Strategic planning

Financial oversight

Staff relationship

6. To what extent is the Board using the collective potential of its directors? (Scale of 1-5; 1 = Not at all, 3 = To some extent, 5 = To a great extent)
7. If the Board could do one thing to improve its effectiveness in the coming year, what would that be?

#6

<p><u>The Art of War</u> Sun Tzu Edited by James Clavell 1983 Delacorte Press, New York</p>	<p><u>Clausewitz on Strategy</u> Ghyczy, von Oetinger and Bassford 2001 John Wiley and Sons, Inc.</p>
<p><u>Management: Tasks, Responsibilities, Practices</u> Peter F. Drucker 1985 HarperCollins Publishers, Inc.</p>	<p>“What is Strategy?” Michael E. Porter November/December 1996 Harvard Business Review</p>
<p><u>Competitive Strategy</u> Michael E. Porter 1980 Simon & Schuster, Inc.</p>	<p>“Crafting Strategy” Henry Mintzberg July/August 1987 Harvard Business Review</p>
<p><u>Good to Great</u> Jim Collins 2001 HarperCollins Publishers, Inc.</p>	<p>“Leading Change: Why Transformation Efforts Fail” John Kotter February 2000 Harvard Business Review</p>