

AGENDA

THURSDAY JUNE 25

- 4:00 p.m. – 6:00 p.m. **Registration**
Doubletree Hotel, 237 South Broad Street, Philadelphia, PA
- 7:00 p.m. Optional dine-around in Philadelphia. Meet in Doubletree Hotel lobby.

FRIDAY, JUNE 26

- 7:00 a.m. – 7:45 a.m. **Continental Breakfast/Networking**
Doubletree Hotel
- 8:00 a.m. We will meet in the lobby at 8:00 a.m. to walk to Philadelphia Bar Association, 1101 Market Street, 11th Floor. (IMPORTANT: Bring your photo ID for building security purposes.)
- ONGOING* *Individual consultations (offered on Friday) Get feedback on your materials, answer confidential questions, wisdom galore!*
- *One-on-One with Robert C. “Bob” Harris*
 - *Meet with an experienced Bar Exec Ken Shear*
 - *Discuss finance with Edward J. “Ed” McMillan*
 - *Web critiques offered by James Goldsmith of Affiniscap*
- 8:30 a.m. – 9:00 a.m. **Welcome**
Ken Shear, Executive Director, Philadelphia Bar Association
Program Moderator: **Rod Wegener**, NABE President
- 9:00 a.m. – 11:00 a.m. **Board Governance & Strategic Direction**
Speaker: **Robert C. “Bob” Harris, CAE**,
The Nonprofit Center
- Big Three CEO Talents
 - Board Roles and Responsibilities – Effective Volunteers
 - Strategic Direction – Your Plan and the Planning Retreat
- 11:00 a.m. – 11:15 a.m. *Break*
- 11:15 a.m. – 12:30 p.m. **Finances**
Sponsored by NABE Administration and Finance Section
- Speaker: **Edward J. “Ed” McMillan, CPA, CAE**
The Nonprofit Guru
- 12:30 p.m. – 1:45 p.m. **Lunch**
Speaker: **Edward J. “Ed” McMillan**
- 1:45 p.m. – 2:45 p.m. **IT for the Small Bar**
Sponsored by NABE IT Section
- Speaker: **David T. Drager**, IT Manager
Chester County Bar Association
- Maximizing resources with IT
 - Member databases/blogs/strategic IT
 - IT on a shoestring
 - Security Issues – Protect Yourself and Your Members

(cont.)

- PDFs
- Importance of back ups

2:45 p.m. – 3:00 p.m.

Break

3:00 p.m. - 4:30 p.m.

Effective Association Management – Internal Assessment of Operations

Speaker: **Robert C. “Bob” Harris**

- Risk Management
- Self Audit
- Personnel Procedures
- Management Procedures
- Emergency Manuals
- Conflict of Interest Statement
- What to Outsource and How do to it

4:30 p.m. – 5:30 p.m.

Management by Example

Moderator: **Doris D. Barnes**, Executive Director, Baltimore County Bar Association

Sharing of Ideas and Models (interactive programming)

6:30 p.m.

Cocktail Reception and Dinner

Doubletree Hotel

SATURDAY, JUNE 27

7:30 a.m.- 8:15 a.m.

Continental Breakfast/Networking – Doubletree Hotel

Meet in lobby at 8:30 a.m. to walk to Philadelphia Bar.

9:00 a.m. – 10:00 a.m.

Small Bar Communications: PR Tips on a Shoe String Budget

Sponsored by NABE Communication Section

Speakers: **Dan A. Cirucci**, Lecturer, Corporate Communications, Penn State University

Mark A. Tarasiewicz, Senior Communications Manager, Dechert LLP

10:00 a.m. – 11:00 a.m.

Membership

Speaker: **Patricia A. “Pat” Yevics**, Director, Law Office Management Assistance, Maryland State Bar

- Recruitment & Retention
 - Young Lawyers
 - New Initiatives

11:00 a.m. – 11:15 a.m.

Break

11:15 a.m. – 12:30 p.m.

Foundations: Nuts to Bucks

Speaker: **Karl E. Emerson, Esq.**, Of Counsel, Montgomery McCracken

- Foundation Start Up
- Care and Feeding of Legal Requirements – State and Federal
- Protecting 501 (c)(3) status
- Fundraising issues

12:30 p.m.

Lunch – The Final Exchange

Make sure you head home with all the information you came to receive. This is the last opportunity bar execs will have to ask questions, discuss sticky situations and share insights gleaned from the conference.

Moderator: **Karyn Linn**, Staff Director, Field Service Program, ABA Division for Bar Services

2:30 p.m.

Wrap Up & Adjourn