

# **Bar Executive Spring 2002**

## **President's Perspective By Diane O'Steen**

The agenda for every NABE Board meeting for the last year has included some topic of Strategic Planning. With guidance and inspiration from last year's president, Betty Braden, and Elizabeth Derrico, Associate Director, ABA Division for Bar Services, a plan has been developed and approved.

The Strategic Plan will be explained more thoroughly in this issue of Bar Executive so I won't go into great detail about it but I would like to highlight a few areas and thoughts.

The greatest challenge for any NABE program is how to accomplish it with the limitations imposed by our geographical locations and our infrequent meetings. The two annual meetings produced by the Program Committee always amaze me with their quality and attention to detail, as the majority of the planning is done with an average of four, maybe five face-to-face meetings. All other details are handled via phone and individual responsibility.

To accomplish the Vision approved by the Board — "In three years NABE is a diverse, inclusive organization that is meeting the professional development and quality of life needs of its members and empowering them to play leadership roles both within their organizations and in the broader community." -every member will need to participate.

How can you help? The most important is to volunteer — to serve on committees, to help with programs, to submit ideas to the Board and to the Program Committee. What are your suggestions for adding diversity to our organization? In what way are we being exclusive and how can we correct it? If you are unable to attend the NABE meetings, what would be the easiest, most convenient method for getting information from the meeting programs to you? Our website, [www.nabenet.org](http://www.nabenet.org), will be able to accomplish some of this and the Website/Knowledge Management Committee, chaired this year by Joyce Hastings, is working with staff at Bar Services to drastically improve the site and the information offered on it.

Tom Tinder will take office as president at the meeting in Washington, D.C. this August. E-mail Tom at [tindert@wvbar.org](mailto:tindert@wvbar.org) to give him your ideas and suggestions. After the gavel is handed over to Tom, I hope to be able to continue my involvement with NABE in several ways and hope you will join me. This has been a fast, busy and different year. I always look forward to new years, new beginnings. See you in D.C.

## **Board set to adopt Strategic Plan**

An "extensive process" that was part of four NABE Board of Directors meetings has resulted in the creation of a Strategic Plan for NABE's future.

"After hours of discussion and debate and review, we now have a plan that allows us to chart a course of where we are now and where we want to be in one, two and three years," said President-elect Tom Tinder.

Tinder said that the board wanted NABE to "do the same thing that other associations do in having a plan for the future." There had been previous attempts at such planning by earlier NABE boards, and the current board wanted to "update their work and make it more comprehensive," Tinder said.

Working with ABA Division for Bar Services Associate Director Elizabeth Derrico as facilitator, the board approved a "definite vision of our organization," with specific assignments for board members and timelines to measure progress, Tinder said.

NABE President Diane O'Steen noted that the plan will require help from all NABE members to succeed. "The most important [action] is to volunteer - to serve on committees, to help with programs, to submit ideas to the Board and to the Program Committee." (see related article)

The specifics of the Strategic Plan will be revealed in August, when the board is expected to officially adopt it at the Annual Meeting.

Tinder said the board hopes that the plan will have continuity even beyond the terms of the officers who helped to fashion it. "We hope it is a living document. It can be modified or amended based upon new ideas that may not have been considered when the plan was put together.

"Having a strategic plan is necessary for a national organization such as NABE. It will help us to communicate better with our members, and make members aware of the benefits of joining and being active in NABE," he said.

## **"Capitalizing on Leadership" — NABE 2002 Annual Meeting, August 6 — 9, Washington, D.C.**

In January, the National Association of Bar Executives held its Midyear Meeting ("Revolutionizing Leadership") in Philadelphia — the birthplace of democracy. Therefore, it seems only logical that the 2002 Annual Meeting will take place in its present home — Washington, D.C. The theme of this meeting is "Capitalizing on Leadership" and several plenary and track programs will continue to build upon the leadership skills presented during the Philadelphia meeting.

The complete schedule of events will be available in the printed program, but listed below are some of the highlighted programs and special events that you won't want to miss:

## TUESDAY, AUGUST 6

Wine and Cheese Welcome Reception, 6:30 p.m. — 7:30 p.m., Omni Shoreham Hotel

-Sponsored by West Group

First Time Attendees and New Member Dinner, 8:00 p.m. — 10:30 p.m., Felix Restaurant, 2406 18th Street

## WEDNESDAY, AUGUST 7

Kickoff Plenary Session: "Whose Comfort Zone Are You In?" — We are proud to welcome back one of NABE's most popular speaker's, Marilyn Sherman, President of Stay Focused Seminars, San Diego, who spoke at the 2000 Midyear Meeting in San Diego. This powerful keynote presentation will inspire you to take your current level of success to the next level.

First Set of Track Programs:

"Sounds Like A Plan" — ABA staff members Debbie Weixl and JoEllen Zacks will offer tips for developing an effective communication plan for your bar association.

"The Bar Executive's Technology Survival Guide" — practical tips from Ross Kodner, President, MicroLaw Inc., Milwaukee, WI, a technology expert — and an attorney, no less!

"360° Evaluations for your Bar Association" — A&F Section Chair Donna Fouste will moderate a panel including Charlie Lorenzetti from the District of Columbia Bar and a local consultant.

Afternoon Plenary Session: "Perspectives on Leadership: A Different View". Moderator: Dorothy Ridings, CEO and President of the Council on Foundations, Washington, D.C. Panelists: Lt. Col. Craig Bullis, Associate Professor, U.S. Military Academy, West Point, NY and John Payton, President, The District of Columbia Bar. Panelists from different disciplines will reflect on how "the right stuff" for leadership is motivated and inspired and how necessary leadership skills have recently evolved.

## Second Set of Track Programs:

"Marketing Your Association: How do we get there from here (and just where is here?)"

— In this program, co-produced by the Communications Section and the Meetings, Seminars and Events Forum, a moderated panel of presenters will share successes and failures. Moderator: Charles Huxsaw, Director of Development, New Hampshire Bar Association, Concord, NH. Panelists: Charles Bingaman, Executive Director, Illinois Institute for Continuing Legal Education, Springfield, IL; Chris Blake, Director of Communications, Connecticut Bar Association, New Britain, CT; and Anne Bracken, Vice President, American Corporate Counsel Association, Washington, D.C.

"30 Hot Technology Tips and CLE Success Stories in 60 Minutes" — Ross Kodner returns to cover everything you need to know for creating, marketing, presenting and leading your membership into "techno-nirvana".

"Recruiting and Retaining Members: Building Blocks to Success" — Presenters: John Maley, President, Indianapolis Bar Association, Indianapolis, IN, and Janet Sosin, Director of Bar Services, Illinois State Bar Association, Chicago, IL. These local and state bar leaders will provide methodology and sample appeals to assist executives in this vital effort.

6:30 p.m. — 8:30 p.m.

Reception at the Ronald Reagan Building and International Trade Center

Sponsored by Legal Directories Publishing Company, Inc.

Rotunda, 9th Floor, 1300 Pennsylvania Avenue, NW, (202) 312-1300

This sophisticated reception space is a circular venue with a 28' dome and a panoramic balcony overlooking historic Pennsylvania Avenue.

Bus transportation will be provided to and from the Omni Shoreham. This is a separately ticketed event.

## THURSDAY, AUGUST 8

Morning Plenary Session: "Conflicts of Leadership: The Critical and Ethical Role of Bar Leaders". Jack Marshall, President, ProEthics Ltd., Alexandria, VA, is a frequent CLE speaker on legal ethics. In this session, he will present a series of lively hypothetical situations requiring the audience to examine leadership challenges.

## Third Set of Track Programs:

"Human Resources Nuts and Bolts" — Ellen Zivitz, labor relations attorney, Sonnenschein Nath and Rosenthal, Chicago, IL, will be on hand to address some of the basic human resources issues that all bar executives face.

"Electronic Newsletters: Goodbye Postage, Hello Mouse Click" - Many bar associations have turned to electronic newsletters and other e-blast methods to provide timely and useful information in an attention-getting format. Panelists: Danial Kim, Editor, ABA Journal, Chicago, IL; Sharon Nolan, Director of Marketing, Chicago Bar Association, Chicago, IL; and Alan Trosky, Director of Information Services, Allegheny County Bar Association, Pittsburgh, PA.

"Coordinating Efforts on the Hill and in the Street: The ABA Washington Office — Lobbying and External Communications" — The goal of this educational panel program, produced by the NABE Governmental Relations Section, is to empower state bar executives, officers and others, to take advantage of and use the resources of the ABA in their own bar's mission. Panelists include: Jennifer Boese, Governmental Relations Coordinator, State Bar of Wisconsin, Madison, WI; William Weisenberg, Associate Executive Director of Public Affairs and Government Relations, Ohio State Bar Association, Columbus, OH; and Robert Evans and Stephanie Ortbals-Tibbs, ABA staff members in the Washington, D.C. office.

"LRIS: The Business of Public Service" — In this track, produced by the NABE Lawyer Referral and Information Service Forum, you will hear practical advice from long-time LRIS managers, including Janet Diaz, Executive Director, Houston Lawyer Referral Service, Houston, TX, and Marion Smithberger, Associate Executive Director, Columbus Bar Association, Columbus, OH.

9:00 p.m. — 12:00 a.m.

NABE After-Dinner Dance Party (All NCBP and NCBF Registrants are invited to attend)

Sponsored by Logistics Management, Inc./Airborne Express

After the rousing success of both the Reading Terminal Market party and the Philadelphia Bar Association's "Rockin' Block Party" at the midyear meeting, the NABE program committee decided that we should bring in a DJ and provide dancing in a ballroom of the Omni Shoreham, as the close of the NABE annual meeting. All NABE, NCBP, and NCBF meeting registrants are cordially invited to attend this party. Who knows? You may even have the pleasure of "stomping your feet" with the new NABE President, Tom Tinder.

Two drink tickets for beer, wine and soda will be distributed to each party guest upon arrival. A cash bar for mixed drinks and additional drink purchases will also be available.

FRIDAY, AUGUST 9

12:30 p.m. — 1:50 p.m.

Joint Luncheon with NCBP and NCBF, includes the presentation of the 2002 NABE Bolton Award for Professional Excellence.

6:00 p.m. — 8:30 p.m.

NCBP/NABE/NCBF Joint Reception at the National Zoo's Amazonia Habitat and Amazonia Science Gallery

3001 Connecticut Avenue, NW (202) 673-4800

Sponsored by LexisNexis

Buses sponsored by the District of Columbia Bar.

Advance Registration information:

You should have received the new registration forms combining the ABA registration with the NABE/NCBP/NCBF registration in the mail. The combined form allows you to register for your particular meeting and to reserve hotel accommodations in Washington. If you did not receive a form in the mail or have questions about the process, please contact Beverley Ware at (312) 988-5353 or [bware@staff.abanet.org](mailto:bware@staff.abanet.org)

**A Breath of Fresh Air**  
**By Tom Tinder**

Please give NABE a Breath of Fresh Air!

In your bar association, your committees and sections are the backbone of your organization. It is exactly the same with the National Association of Bar Executives.

Each year, you encourage, coerce, and entice your members to be participants in a committee or section so that you can have their input and insight and so that they will become more interested and involved in your organization.

Duh—NABE has the same desire and interest in you as you have in the members of your group.

Soooooo, give a little bit of yourself by signing up to be a member of a NABE committee, a section or a forum. There is something for everyone. You can be a vital part of the entity, help to improve its operation, infuse it with your own special brand of knowledge and enthusiasm as well as give it a Breath of Fresh Air.

Don't sit back and let someone else do it—get in the game. Share! Participate! Enjoy!

You only get out of life (and NABE) what you put into it. Sign up NOW.

Start breathing that fresh air in NABE's direction.

**At the last NABE Board of Directors meeting, the Board:**

- Appointed committee of Tom Pyrz (chair), Keith Norman and Ev Sullivan to review and update the NABE operations manual
- Adopted the 2002-03 budget, which is a balanced budget. A net surplus is expected for the 2001-02 fiscal year.
- Voted to ask the ABA Board of Governors to designate a seat for a NABE member on the Standing Committee on Bar Activities & Services
- Voted to make the electronic pictorial directory available immediately, with the print pictorial directory available in September
- Approved new honorary members of NABE conditioned on their acceptance of the honorary membership
- Heard a report from ABA President-Elect A.P. Carlton on the current state of affairs at the ABA and on his plans for his year
- Agreed to allow the Communications Section to update its information on the NABE Web site using its money and to keep the Leadership Development Task Force
- Voted to allow the CSE Committee to have sponsors of educational programming at the CSE Retreat to have time on the program, provided that such time is reasonable and does not impede the effectiveness of the program and as long as the sponsor does not control the content of the programming.

**NABE Election Results**

Dear NABE Member,

I am pleased to report that results are in for the open positions on the 2002-2003 NABE Board of Directors. For the coming year, the five open positions on the Board, will be occupied by the following individuals:

Vice President - Anne Fritz, Memphis Bar Association

Secretary - Larry Buxbaum, Hennepin County Bar Association

State Bar Director - Rod Wegener, Oregon State Bar

Local Bar Director - Frank Moran, Boston Bar Association

Director-at-Large - Janet Sosin, Illinois State Bar Association

The Elections Committee declares the above petitioners to be elected to the respective offices for the coming year, and offers our congratulations. We thank everyone who participated in this year's election and encourage all NABE members to consider service on the Board of Directors in the future.

Sincerely,

Jack Harkness

Chair, NABE Elections Committee

### **Anne Fritz Understands the Needs of Local Bars**

The particular needs of local bars will be on Anne Fritz's mind when she becomes NABE president in two years.

Fritz, the executive director of the Memphis Bar Association, was recently elected NABE vice president. She said she is very aware of differences between larger and smaller bars, and plans to spend time focusing on the "burdens placed on smaller bars."

Adapting technology is "one of the big equalizers" that helps local bars stay competitive with their larger brethren, Fritz said.

She initially got active in NABE through the Program Committee. She enjoyed the chance to meet with colleagues who face similar challenges in running their associations. She was NABE secretary for the past year.

Fritz said she is "honored, and a little nervous" about being elected to eventually become president.

**MEET THE 2002 — 2003 NABE BOARD OF DIRECTORS:**

President - Thomas Richard Tinder, Charleston, WV

President-elect- Thomas A. Pyrz, Indianapolis, IN

Vice President- Anne Fritz, Memphis, TN

Secretary - Laurence Buxbaum, Minneapolis, MN (2003)

Treasurer - Evelyn Sullivan, Lancaster, PA (2003)

State Bar Delegates - Rodney Wegener, Lake Oswego, OR (2004)

Allan B. Head, Cary, NC (2003)

Local Bar Delegates - VACANT (2004)\*

Ann G. Scarle, Baton Rouge, LA (2003)

Delegates-at-Large - Janet M. Sosin, Chicago, IL (2004)

Cynthia Zwick, Phoenix, AZ (2003)

Immediate Past President - Diane B. O'Steen, Atlanta, GA

ABA HOD Representative - Thomas A. Edmonds, Richmond, VA (2003)

\* Frank Moran, the elected Local Bar Delegate for 2002 — 2004, will retire as executive director of the Boston Bar Association on November 1, 2002. The NABE by-laws require that a board member be a regular member, that is, one who is employed by a bar association. Therefore, as of May 31, Mr. Moran resigned his position. The Board will vote on and appoint a successor to fill this vacancy at its meeting on Tuesday, August 6, in Washington, D.C.

The Board of Directors requests that any NABE members from local bar associations interested in being considered for this position should write a letter to Diane O'Steen indicating his or her interest in this position. Please include a statement indicating the reason(s) for your interest in serving on the NABE Board of Directors.

Please email or mail your letter prior to Monday, July 14, 2002:

Diane O'Steen  
Executive Director  
Atlanta Bar Association  
229 Peachtree Street

Suite 400  
Atlanta, GA 30303  
[dosteen@atlantabar.org](mailto:dosteen@atlantabar.org)

## **News from the NABE Sections**

With the start of a new fiscal year beginning on June 1, 2002, it seems like all three sections within NABE are all focused upon the same topics. These include dues renewal, planning programs for the 2002 Annual Meeting in Washington, DC, and planning their own respective workshops for the coming year.

### **Administration & Finance Section —**

The A&F Section is well represented on the 2001 — 2002 NABE Program Committee. Chair Rod Wegener, along with Julie Armstrong, Sam Clinch, Sherry King and Charlie Lorenzetti, have all been instrumental in developing and organizing several of the plenaries and track programs for this year's annual meeting in Washington, D.C.

In addition, the section has begun to plan the 2003 Tech Show, to be held February 3-4, 2003, in conjunction with the NABE Midyear Meeting in Seattle, WA. Under the fearless leadership of Craig Combs, the incoming section chair, the Tech Show Committee is planning a broad range of programming to keep the technologically-challenged, as well as techies, interested. With Julie Armstrong, Rick Bannister, Sandra Cousins, Greg Derwart, Pat Dieken, Kari Hartman, Charlie Lorenzetti and Linda Oligschlager, as the core committee members planning the event, it is sure to be a "must see in 2003."

### **Communications Section —**

The section will co-produce a track program with the Meetings, Seminars and Events Forum on Wednesday, August 7, during the annual meeting in Washington, D.C. The track, titled "Marketing Your Association: How Do We Get There From Here? (And Just Where is Here?)", will feature Chris Blake, incoming section chair, as one of the panelists offering to shed some light on this question.

And speaking of Washington, D.C., the section's executive council knows that there is never enough time to see and do the things you want to during the Annual Meeting. Therefore, we're bringing you back to this area in the fall! "Spin City" is the title of the 2003 Communications Section Fall Workshop in Alexandria, VA. The workshop will take place September 25-28, at the Hilton Old Town Alexandria. Details and registration information will be coming soon, but if you have immediate questions, please contact Cynthia Kuhn, chair, at (202) 626-3470 or [cynthia@dcbar.org](mailto:cynthia@dcbar.org).

### **Governmental Relations Section —**

The section is also producing an educational track program for the annual meeting in Washington, DC. The track, scheduled for Thursday, August 8, is called "Coordinating Efforts on the Hill and in the Street: the ABA Washington Office — Lobbying and External Communications" will feature section members Jennifer Boese and William Weisenberg on a panel with ABA staff members, Robert Evans and Stephanie Ortballs-Tibbs.

In addition, the section has selected the date and location for its annual fall workshop. After last year's successful meeting in Austin, TX, section members enthusiastically voted to hold this year's workshop in Charleston, S.C. The workshop will be held November 14-16, 2002, at the French Quarter Inn. For more information, please contact Ken Goldsmith at (202) 662-1780 or goldsmithk@staff.abanet.org.

On behalf of all the sections, we look forward to seeing you in the Nation's Capital!

### **Partners of the Americas By Tom Tinder**

For more than 30 years, the State of West Virginia has participated in the international Partners of the Americas Program. States in our country have formal partnership arrangements with states in South America to undertake exchange programs on cultural, educational, governmental and economic matters.

West Virginia's partnership is with Espirito Santo, a state of approximately two and a half million persons located along the coast of Brazil. Over the years, citizens from Espirito Santo have visited West Virginia cities regarding education matters, for cultural activities and for governmental interaction.

About four years ago, the State Bar participated in the first exchange program in the judicial/legal field. A State Supreme Court Justice and a State Circuit Court Judge from Espirito Santo spent several days in West Virginia learning about our legal and judicial systems. In addition, our State Bar leaders and Judiciary officials received valuable information about various aspects of the legal/judicial system in Espirito Santo. Highlights of their visit included opportunities to discuss issues with members of our Judiciary and participation in a meeting of the State Bar's Long Range Planning Committee.

Then, last fall, the Brazilian Circuit Court Judge, Tasso Lugon, made another trip to West Virginia. Again, there were non-stop activities that included making plans for a group of West Virginians to go to Espirito Santo in February of this year. The group would consist of members of the Judiciary, the legal profession and the education community. Judge Tasso told us that there would be a statewide conference on legal issues and that we would be given legal topics on which to make formal presentations.

Over the next several months, our group met to put together our remarks on legal topics as well as to be educated about Brazilian history, traditions and customs. Our group consisted of a Supreme Court Justice, a Circuit Court Judge, a Magistrate Court Judge, a Past State Bar President and approximately 15 students and faculty members from the University of Charleston.

The highlight of our visit was the statewide Judicial Conference that was held in Victoria, the capital of Espirito Santo. The speakers included judges, lawyers and professors from both Espirito Santo and other parts of the country, and featured the Secretary of the Department of Justice. The Governor was present at the opening ceremonies where mementoes were exchanged and he received the official West Virginia State Bar seal.

West Virginia's delegation made presentations that were well received including remarks on West Virginia's Constitution, laws, judicial system and legal system, a presentation on bioethics/genetics, an overview of our innovative video conference system in the courts, and observations on alternate dispute resolution techniques and mediation. I also talked about mediation programs in our state as well as environmental law. (I was way more than 50 miles from home, so I was definitely an "expert"! ) I even got my wife, Rebecca, to inform the participants about West Virginia's Family Law Mediation Program.

Interestingly, the language spoken in Brazil is Portuguese; whereas, all of the other South American countries speak Spanish. All of us had to use headphones, like the United Nations, in order to receive instant translation in either Portuguese or English.

Besides the conference, there were other educational activities. We had a beneficial trip to the Espirito Santo judicial building where the State Supreme Court hears arguments. There are twenty-one Justices on the Supreme Court - can you imagine being questioned by twenty-one Justices during your oral argument?!

By the way, I spent an extensive amount of time talking with Omar, the Executive Director of the Bar Association for Espirito Santo. There are approximately 11,000 persons with law degrees in Espirito Santo, but only about 3,000 of them are involved in the active practice of law. The remaining 8,000 lawyers have not taken or passed the bar examination - they want to have a law degree which helps them with other employment opportunities.

We had a heartwarming visit to Santa Teresa, a small town in the mountains of Espirito Santo where the local school band of about 20 students - and a few additional townspeople - played the National Anthems of the United States and Brazil in a most spirited fashion. Each of us had brought t-shirts to provide to the needy children in the area - more than 200 Brazilian kids are proudly wearing American t-shirts. We also had intriguing conversations with the local Prosecuting Attorney and Public Defender - there were many similarities and some differences in comparing their work with the responsibilities of those officials in our smaller communities here in West Virginia.

The Partners of the Americas Program is a perfect example of how everyone can benefit from exposure to people with different cultures, different customs and different countries. We all have similar dreams and desires. Judges are judges, lawyers are lawyers and people are people in Espirito Santo and in West Virginia.

Get some information about the Partners in the Americas Program in your state. Your participation in it will certainly be an outstanding life experience!

### **Upcoming NABE Events**

August 6 - 9, 2002

ABA/NABE/NCBP/NCBF Annual Meeting

Washington, DC

Omni Shoreham Hotel

Contact: ABA Service Center

312/988-5522

[abasvctr@staff.abanet.org](mailto:abasvctr@staff.abanet.org)

September 13 - 14, 2002

NABE/NCBP Fall Program Committee Meeting

Chicago, IL

Contact: Shelley Joksimovic

312/988-5354

[joksimos@staff.abanet.org](mailto:joksimos@staff.abanet.org)

September 20 - 22, 2002

NABE/NCBP Executive Councils Meeting

Omaha, NE

Contact: Shelley Joksimovic

312/988-5354

[joksimos@staff.abanet.org](mailto:joksimos@staff.abanet.org)

September 25 - 28, 2002

NABE Communications Section Workshop

Alexandria, VA

Hilton Old Town Alexandria

Contact: Cynthia G. Kuhn

202/626-3470

[cynthia@dcbar.org](mailto:cynthia@dcbar.org)

November 14 - 16, 2002

NABE Governmental Relations Section Workshop

Charleston, SC

French Quarter Inn

Contact: Ken Goldsmith

202/662-1780  
goldsmithk@staff.abanet.org

February 4, 2003  
NABE Administration & Finance Section Technology Show  
Seattle, WA  
Sheraton Seattle Hotel & Towers  
Contact: Shelley Joksimovic  
312/988-5354  
joksimos@staff.abanet.org

February 4 - 7, 2003  
ABA/NABE/NCBP/NCBF Midyear Meeting  
Seattle, WA  
Contact: ABA Service Center  
312/988-5522  
abasvcctr@staff.abanet.org

March 30 - April 2, 2003  
NABE Board of Directors Spring Meeting  
The Greenbrier  
White Sulphur Springs, WV  
Contact: Tom Tinder  
304/558-7993  
tindert@wvbar.org

August 5 - 8, 2003  
ABA/NABE/NCBP/NCBF Annual Meeting  
San Francisco, CA  
San Francisco Hilton  
Contact: ABA Service Center  
312/988-5522  
abasvcctr@staff.abanet.org