BAR EXECUTIVE

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What’s new? We’ll tell you

Bar associations are constantly being faced with changes these days. Whether it’s new technologies they can use to better communicate with members, or different attitudes coming from members based on what they expect from the association, there is pressure to update, upgrade, or just plain try something new.

Bar Executive recently asked some association executives to talk about one new project or idea their bar implemented in the past year or so. Here’s what your fellow bar execs had to say.

• Susan Andres of the Alabama State Bar talks about a new position that will help the bar beef up its Web offerings.

“After having Web content management a part-time position in our communications department - my assistant handled this and did a great job, but we nearly killed her doing it!- we have now created a full-time position for a Web Administrator. The catalyst for making this decision was when we recently went to an on-line bar directory for the first time. The number of hours required to do the job we envisioned far exceeded our projections. With our firm belief that the Web will be our major communication tool in the future, we have just hired someone with both computer and graphic design skills to take us where we want and need to go. We will now also be able to honor the requests of many of our sections to provide them with their own Web site and be able to assist them in maintaining those sites. We feel our Web site serves our members in so many ways now - and can't wait to be able to keep expanding those services!”

• Dan Wise at the New Hampshire Bar Association reports on a small project that may pay some big dividends.

“The legal services department has begun a modest program that utilizes simple desktop publishing software such as Publisher to create seasonal greeting cards to send to Pro Bono panel members to, cleverly and gently, ask them to take Pro Bono cases… The Pro Bono people believe the idea is having results --while it might be hard to determine whether there have been increased referrals, there no doubt has been increased good will since the Bar pro bono department is giving members an unexpected smile as it pitches for continued volunteerism.”

• The Maryland State Bar Association joined the ranks of those bars offering e-newsletters, notes Janet Eveleth.

Bar Briefs is a monthly newsletter whose content is gathered from all the association’s departments, according to Eveleth. There are legislative updates, a message from the president, a calendar of upcoming events and other association-related information. Members may opt-out of receiving Bar Briefs, but very few have.

Eveleth says it’s important to get contributions from as many departments as possible, and adds that establishing and sticking to deadlines—even if it means that someone’s news item doesn’t make it into the issue—is key to a smooth flow of information.

• The North Carolina Bar Association ran its first-ever legislative day, where lawyers met with legislative leaders and other key lawmakers, says Michelle Frazier.

“We wanted to make members aware of how they can influence the process,” Frazier says. Those who attended were primarily from the Young Lawyers Division. Speakers included the House speaker and Senate minority leader. Frazier says bringing in high-quality speakers helps to attract attendees.

• The Connecticut Bar Association recently went through installation of a new association management system, says Tim Hazen.

The association had outgrown its previous AMS, Hazen says. The bar considered a custom system, but “didn’t want to depend on some guy in his garage” for support and updates. A group of five CBA employees spent months evaluating solutions, and finally settled on one.

The bar set a deadline of 14 weeks for conversion of their existing data and installation of and training on the new system, so that dues invoices could be sent using it. Miraculously, the company doing the work finished on time and stayed on budget.

Hazen advises others planning such a switch to perform “an exhaustive search” at all the options, and to involve all departments in setting the requirements. “Ask them what’s lacking and what they would like.”’ ”

Helping employees to manage change

By: Colleen J. McManus, SPHR
State Bar of Arizona

The State Bar of Arizona recently purchased a building and relocated its offices. There were many things we did to successfully help our employees manage this change. Some key points emerged that can certainly apply to other types of organizational change.

What’s the Goal?

We let employees know right up front that our lease was expiring and our board was debating the merits of purchasing rather than renting. When the decision was made to purchase a building, we informed them that a building committee had been established for this purpose.

Generate Involvement

We invited staff to participate from the beginning, including serving as members of the building committee. We also surveyed employees during this process. They completed surveys and were asked to provide input on items such as workspace design, storage needs, employee break areas, restrooms, security, and parking. While it created extra work for management to address the many requests we received, this process created real ownership among our employees and fostered a higher level of trust between management and staff.

Share the Work

We developed staff teams to focus on various aspects of our transition. One team addressed the design and layout of workstations. Another gathered information on amenities in the new neighborhood. They published a list of nearby restaurants and other businesses of interest to our employees on our Intranet. The HR team wrote letters to each of these businesses, informed them that our 100 employees had just moved into the area, and invited them to donate a gift certificate or other item to introduce our employees to their business.

The committee established to work on employee break spaces did a great job. They ensured that appliances and furniture were installed in break rooms before we moved in. The weekend of the move, they provided volunteers with complimentary beverages and snacks. So, in the midst of chaos, our employees had a nice place to take a break and have something to eat. Our security committee identified and worked to address security needs, and we had a security system and security guard in place from day one in the new building.

These committees gave employees a way to participate in a meaningful way, and also did much of the legwork that management might have otherwise done.

Communication is Key

During such a transition, information and details constantly change. It was challenging to keep everyone current. We formed another group of key people, including: IT staff; the telecommunications manager; the office administrator; the records manager; the communications director; the HR director; and others. In the last weeks before the move, this group met daily to share information. This information was conveyed to staff in daily email messages under the theme “Homeward Bound.” These messages kept staff apprised of rapidly changing information and helped all to be better prepared for the move and know what to expect.

Don’t Forget the TLC

The HR team prepared first-day "survivor kits" for staff. These kits contained office supplies, an updated phone list and floor plan, and a stress ball. So, even if staff couldn't remember what box to open first, we provided them with a few tools to help them get through their first day. We met with every employee to provide the kits and ensure that each felt welcomed! We also catered in lunch, a small gesture that was very much appreciated by people working hard to get unpacked and settled.

Have a Process to Address Concerns

Of course, no move or other large change is without its share of bumps in the road. We have areas in which workstations need to be modified, storage cabinets installed, etc. We also have additional requests from staff now that they've worked in the new space. We implemented an online project request system. Our employees enter their request into this electronic helpdesk, and projects can quickly be prioritized, tracked, and addressed. We have also continued to provide staff with informational email updates, although these are not daily anymore.

In Conclusion

We learned that by involving our employees, giving them a voice and a meaningful opportunity to participate, listening to them and using their expertise, and working sincerely to address their questions and concerns, we were much more effective in managing change.

Colleen McManus is the Senior Director of Human Resources for the State Bar of Arizona. She is certified as a Senior Professional in Human Resources, SPHR and is a member of the Society of Human Resource Management and the National Association of Bar Executives.

Tech talk: New approach to IT worth watching

By Dan Kittay
Owner, Kittay New Media

Dealing with technology means dealing with change. You build a Web site, then eventually realize you (and your members) want more out of it, so you upgrade the site. Maybe in a few years you do it again, as your audience and you become more sophisticated in what you want your site to deliver.

Same for IT needs. As you expand the scope of your Web site, you want to integrate some of its functions into your member database. Unfortunately, the database is several years old, and possibly designed way back when the Web was just a technology that the military and academics used to communicate. So you get introduced to the IT upgrade.

There is, of course, one thing that never changes with technology: the need to spend more money on it.

In speaking with various association executives, I get a sense that a number of you are considering upgrades to IT systems. Whether you've outgrown your current system, or want more features and flexibility, you're seeking to go to the next level, and wondering which way to turn.

There are a number of possible approaches, including: off-the-shelf software, customized applications, and hosted applications. Each has its plusses and minuses.

Off-the-shelf may be the least expensive approach, but may require customization before it's ready to meet your needs. That means having an in-house IT staff, or hiring a consultant to do the work.

Customized applications will be designed around your exact needs, but will likely cost more and may leave you vulnerable to the ability of the vendor to provide service and support on an ongoing basis.

Hosted applications have the advantage of minimizing your hardware requirements and people to support the hardware and software, but raise questions about security of your data and access to it if Internet connections on either end fail. And you also need to make sure your vendor will stay in business and support your system.

An interesting approach to meeting association IT needs is emerging in a consortium called BarAlliance. Many of you have probably seen demos of their software at NABE meetings. Spearheaded by folks at the Utah State Bar, it's an attempt to create Association Management System software that can be used by consortium members, either as is or with some minimal customization. It can either be hosted or run in-house.

The idea is that most associations gather similar information from and about their members, and use it in a finite number of ways. By working with a vendor to design software that can handle those needs, the consortium hopes to produce a core module and other add-on modules that would satisfy bar association IT requirements. The core module has begun implementation, while add-ons are on the drawing board.

This approach sounds promising, although there are some obstacles to be overcome. Some association functions are more complex than others, and it remains to be seen if a common ground can be found in designing modules that don't require a lot of customization.

And, of course, enough associations have to be convinced that it's worth adopting the software to keep the consortium healthy, and give it the leverage it will need in directing future development of the software. That's not a given in a diverse association universe.

It's to their credit that consortium founders are plowing ahead, and it's a development worth watching.

Discipline information headed to Web

By Rita C. Aguilar, ABA State Legislative Counsel
Assisted by Cathleen McCarroll, ABA Program Assistant

As the popularity of on-line resources continues to grow, state bars and lawyer disciplinary agencies across the country have begun utilizing the Internet as a tool for posting lawyer disciplinary information on their web sites. The type of information posted on these sites can include disciplinary sanctions, as well as, in some instances, copies of the opinions or orders imposing the discipline.

According to Jim Grogan, President of the National Organization of Bar Counsel, in a world where many people get much of their information from the Internet, this evolving practice can help make information more accessible to the general public and increase public trust and confidence in the legal profession.

The American Bar Association has long supported public access to lawyer disciplinary information. For example, the ABA's Commission on Evaluation of Lawyer Disciplinary Enforcement (McKay Commission) stated in their 1992 report, Lawyer Regulation for A New Century Report of the Commission on Evaluation of Disciplinary Enforcement, "All records of the lawyer disciplinary agency except the work product of disciplinary counsel should be available to the public after a determination has been made that probable cause exists to believe misconduct occurred, unless the complainant or respondent obtains a protective order from the highest court or its designee for specific testimony, documents or records." This policy is also set forth in Rule 16 of the ABA Model Rules for Lawyer Disciplinary Enforcement.

To date, as many as twenty-nine jurisdictions have followed this movement toward electronic communications and maintain an Internet link to lawyer disciplinary information, including: Arkansas, Arizona, California, Colorado, Connecticut, District of Columbia, Florida, Illinois, Indiana, Kansas, Kentucky, Louisiana, Maine, Michigan, Maryland, Massachusetts, Minnesota, New Jersey, North Carolina, North Dakota, New York, Pennsylvania, Texas, Utah, Virginia, Vermont, Washington, Wisconsin and Wyoming.

Register now and save on NABE events

You'll save $50 when you meet the early-bird registration deadline on May 27 for the 2005 NABE Annual Meeting. All sessions will be in the Sheraton Chicago, 301 E. North Water Street.

Check the NABE Web site at www.nabenet.org for registration information as well as scholarship applications.

Those eager to register for the Communications Section Workshop or the Government Relations Section Workshop can find that information on the Web site’s Section pages. The Communications Section will meet Sept. 28 through Oct 1 in Orlando, FL. The GR Section will meet Nov. 7 through 9 in Austin, TX.

30-second drill

Tips from a membership retention calendar reprinted with permission from Mark Levin, CAE, CSP

- Check your organization's budget. Does it include a line item that is clearly designated as "Membership Retention?" If not, make sure the next year's budget does!
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- Use current officers to do new member orientations at your meetings. Peer-to-peer orientations are more meaningful than orientations given by staffers.