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## Where do you draw the line?

Good fences may make good neighbors, but it takes a lot more effort for most bar executives to set up boundaries in their professional and personal lives.

Whether it's deciding if volunteers may communicate work assignments directly to staff, how to handle personal relationships that may affect work, or simply deciding how to balance work life with the effort to have some semblance of a personal life, many execs find it takes planning and flexibility to keep things running smoothly.

Go to almost any NABE meeting these days and you'll hear conversations and program topics devoted to dealing with these questions. And as interviews with some executive directors show, there isn't unanimity about the questions or their answers.

Regarding dealings between staff and volunteers, "much of it depends on the volunteers. You have to have a philosophy, but you also have to be flexible," said Sheree Swetin, executive director of the San Diego County Bar Association.

Swetin prefers that volunteers communicate directly with her if they want something done, and allow her to then assign the request to the staff. "I can't supervise the staff adequately if I don't know what kind of work the staff has been given by members of the board or sections or committees. I also have to be able to rely on my staff people to tell me if they've got a volunteer who's assigning work to them to make sure that I know that that's happening. That way I can take care of it if I don't want it happening, or can at least factor it into their workload if it's an appropriate assignment of work."

Once a project has been assigned, Swetin says she has no problem with volunteers communicating directly with the staff person working on the assignment.

Taking a slightly different approach is Allan Head of the North Carolina Bar Association. While he also doesn't mind volunteers dealing directly with staff after a project has begun, Head says it's also OK with him for volunteers such as the bar president to call staff directly to initiate efforts. All he asks is that he be kept informed.

"That places a tremendous amount of responsibility on the other staff, who have to realize that they've got to keep me in the loop," Head said. If a volunteer has an unusual request or one that might seem to present problems, Head also wants his staff to let him know before acting on it.

Drawing boundaries between staff and volunteers when it comes to work assignments is one thing; what about personal relationships that develop between staff and the members? As Swetin pointed out, "As people become more involved in their work and careers, that's often the place where they meet other people."

That's not a problem in and of itself, but it can cause trouble if there's "a perception that someone is being treated differently because of social relationships," she said. If that were to happen, Swetin said she would try to take steps to minimize professional

interaction between the people involved. “I would try to relegate it to one arena or the other.”

Head said he agreed that a personal relationship of this type would be OK as long as “you make sure you continue business in a businesslike way.”

Whenever bar executives gather, one topic of conversation that’s likely to emerge is how to separate work time from personal time, and enjoy what is known in the rest of the world as a “personal life.”

Head says that while there are times when he is not able to be at family functions because of work, “I have not tried to separate them. My family has been very grateful over the years for all that the North Carolina Bar Association has done for them. My job has been to explain that there may be times when the job comes first.”

Swetin acknowledges that she doesn’t “do as good a job as I should” in setting boundaries in this area. “There are many evenings when I’m not home for dinner or home to put my daughter to bed... Lawyers tend to want to do things between five o’clock and nine, so we have a huge number of section and committee meetings and other events that happen after hours that I feel like I need to be at, both to keep on top of what’s happening in the legal community, and to represent the bar association.”

Coming in later the morning after working late isn’t always an option either, Swetin said. “I don’t want volunteers calling at 9 a.m. and getting voicemail.”

Swetin said she isn’t sure what the answer is. One approach would be to try to educate board members about the workload executive directors face, and perhaps discussing flex time. Executive directors who don’t set some limits run the risk of “burning out and saying ‘I just can’t do this anymore, year after year.’ ”

## **If the hotel isn't giving you what you want, ask for it**

**By Wanda A. Claiborne, CMP  
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Recently, my six year old son stood pouting at the conclusion of his soccer game. When I walked over to him to inquire as to the source of his distress, I learned that he had not gotten a bag of candy that the coach was giving away to the players. “Well,” I inquired, “did you ask for some?” Much to my surprise, his answer was no!

Quite like my son, many meeting planners find that we are pouting on the sidelines without ever asking for what we want on behalf of our associations. Hotels are in the business of making money. Conference Centers are in the business of making money and if we are honest, so is just about every place that we can imagine to hold our conferences, meetings or retreats.

We, on the other hand, are in the business of saving our associations money. Hotel negotiating can often seem like a trip to your local car dealership. We leave the negotiating table feeling like we are paying way too much for way too little.

Here are some negotiating pointers to keep in mind whether you are a seasoned planner or a rookie of sorts:

**1. Room Block**

Do you always meet or go over your room block? Use this fact to work with the Director of Sales to lower your room rate. After all, room rentals are the number one source of income to hotels.

**2. Sign Now**

If possible, sign contracts as far out as possible and lock in caps on the increases the property can charge for Food and Beverage.

**3. Coffee Breaks**

Property not willing to give on many of your requests? Try asking them to comp your coffee breaks. The cost to them – minimal. The savings to you – great!

**4. I've been here before**

If you use the same property (on a consistent basis), lock in lower room rate increases on a yearly basis.

**5. Connect me please**

Many properties add a large surcharge for the use of calling out from your hotel room. Ask that they limit those charges for local calls.

**6. I don't want to sign that**

Ultimately, hotel negotiations can be a source of fun for some and stress for others. If you know the history of your association, combined with the freedom of the hotel, this can be a rewarding process. Remember that many times the slate is clean, so get busy mapping out what you want.

Incidentally, my son did go back and ask for the candy. Guess what? He got it. The lesson learned, don't be afraid ask for what you want!

*For more pointers on hotel negotiating - The Meetings, Events and Seminars Forum will sponsor a track program at the NABE Midyear in Salt Lake City. Bring your questions and scenarios to hear from our panel of experts!*

## **Hurry! Read this article before it becomes obsolete**

If you think that having your Web site up-to-date has you ready to meet the communication needs of the next generation of members, think again. According to an

expert on associations, Web sites will be only one technology your future members will expect your bar to provide, if you want to stay relevant.

“The next generation of technology for connection is wireless and telecom oriented, rather than plug in the wall and computer based. These are kids who IM, and don’t e-mail. Even on their cell phones they’re IMing, not making voice calls. Their method of communication is shorthand, it’s quick, it’s instantaneous and it’s always on,” said Bruce Butterfield, president of the Forbes Group.

The communications habits of what Butterfield called the Millennial Generation—those born between 1982-2002—may run smack into the model used by most associations today, Butterfield said.

“Associations tend to be communications oriented toward provider-driven rather than recipient-driven information. It’s time driven—we put out the monthly newsletter, the quarterly report, the annual roundup. This next generation of kids is always on. I don’t know that associations have figured that out yet.

“They are in a position where they are going to find themselves in a bit of a cropper, trying to appeal to that next generation of potential members who expect instantaneous communication, the availability of information and knowledge around the clock, and the ability to be heard and recognized regardless of experience, just because they’ve always been heard and recognized.”

The news is not all bad, according to Butterfield. Millennial children “have always worked in groups. The good news is they’re used to the concept of being in a group, and associations are people banding together for a common purpose. The downside is that they tend to self-organize. So the question becomes, is this a group of people who are going to want the traditional association model, where you have an organization to which you belong, which provides certain opportunities? Or are you going to find those opportunities by grouping with others of your choice?

So what can associations do to steer this next generation to becoming and remaining members? “In the future, associations are going to have to be more the facilitators of collaboration, conversation and knowledge generation, than they are the providers.

“There’s some good news there. One of the things that I think associations do very poorly is intelligence gathering. They are great at sending out information. But they are not particularly good at synthesizing intelligence.”

Butterfield says that listservs, for example, are a great source of learning what is important to members, and which issues are emerging “which are harbingers of product and service creation. If you don’t have someone monitoring the conversations, you’re missing out on an enormous amount of free, member-produced knowledge, that can be repackaged and sold.

“Managing the conversation is a product opportunity for associations, and it’s going to get greater as these younger generations of people come into the profession and move into bar association positions.”

## **Tech talk: Better keep up-to-date**

By Dan Kittay

Owner, Kittay New Media

If you read the interview with Bruce Butterfield elsewhere in this issue, you now know that a lot of technologies you've spent time and money adapting may not have you set up to deal effectively with the next generation of prospective members heading your way. Welcome to the wacky world of hi-tech.

It's not that you won't need a Web site or e-mail newsletter; Butterfield and others say that people who've grown up communicating by sending Instant Messages on their cell phones won't see the value in joining an organization that sends them a load of material once a month, or even posts it on a Web site.

Does that mean you should abandon everything you're doing and spend untold thousands of dollars on getting the latest and greatest technologies? Well, the geek in me says "Sure, why not?" But the practical business owner says that, just like with any program or service you offer, a reasoned approach based on research, planning and testing is the best way to go.

For one thing, the next generation of lawyers that Butterfield is talking about isn't here yet. The Millennial Generation he refers to will start graduating from law school around 2008. Of course, if you want to get them interested while they're still in law school, the time to start is soon.

So, how do you decide what to do, and when? One way is to make sure someone in your association is paying attention to new technologies and trends emerging in the marketplace. This can mean going outside the usual circle of advisors and those you ask for feedback. In many associations, the volunteer powers-that-be are veteran attorneys who've worked their way up the ranks and are reaping the just rewards for their efforts. The drawback is that many (not all) of them are not exactly on the cutting edge of technology adopters. They've got e-mail, and can read the Word documents you send them, but that's about it.

If you want to know what technologies tomorrow's lawyers are using, you've got to find a way to ask them. Visit law schools, tap your young lawyers section, check out listservs devoted to technology. Or even read the mainstream media.

There's a lot of talk about blogs these days. Short for Web Logs, these are at their core online journals, that allow people to record their thoughts for others to see, and in many cases for others to comment on and add to. Besides influencing presidential elections, they can serve a useful purpose for your association as a conduit for information you want your members to know. For example, instead of just listing an upcoming CLE seminar, you could have a short note from the instructor talking about the program and how it could be helpful to the attorney.

You also may have heard of, or used, RSS feeds. RSS (Really Simple Syndication) is a method of sending out "headlines" of the information that's available on your Web site.

People who have RSS readers built in to their Web browsers or as stand-alone applications can query your site to see what headlines you're offering, and then click on what interests them to read more. Kind of like an e-mail newsletter that offers links to your site, with the important difference being that people come to you when they want the information, instead of being hit with yet another piece of e-mail.

Someday you'll send IMs to your members' cell phones reminding them of the CLE seminar they've registered for. Until that day, there are technologies you can explore and adapt today, as you do your due diligence on what's coming tomorrow. Your lawyers-to-be know all about them; shouldn't you?

## **What is this stuff?**

### What Is This Stuff

When did we get into the business of doing "stuff?"

I thought we were leading voluntary organizations which are dedicated to improving industries, professions, communities, and/or some greater good. But it seems that more and more associations and societies have given up on -- or, in their minds, moved beyond -- the reason for their existence. Two recent series of events really brought this point home.

### Series of Events Number One:

While preparing for a group of membership development programs, I invited attendees to send samples of their literature for "evaluation." In reading through the brochures, I found that many of my sister organizations now supply the following "tangible benefits" to their members:

(Please note that these are actual listings from real life trade associations, professional societies, and chambers of commerce, and not exaggerations made up to make this article sound more profound.)

Life insurance; car insurance; homeowners insurance; auto rental discounts, with your own member number on the card; affinity credit cards with your association's logo!; personalized business forms; fax machine discounts; bumper stickers; jackets; caps; lighters; pens; and calendars with your company name and association logo; discounts on amusement park rides; and many more of the same types of programs and services.

### What Is This Stuff???

Call me old fashioned, call me unsophisticated, call me a Neanderthal (I've been called all of them many times already), but I don't understand how spending time and money to create a laundry list of "stuff" to put in a brochure does one thing to advance the goals of an association or society.

Of course you need to have non-dues sources of income. But too many associations -- including one in which I am an active member -- have gone off the deep end. We're not supposed to be money machines. Our first thoughts shouldn't be how much we can soak our suppliers and members for. Our job is to identify and meet the actual, factual, real-life, they-do-this-for-a-living needs of our members. How does an amusement park discount program do that?

Series of Events Number Two:

I had the opportunity to work with three very respected professional societies in the area of strategic planning. Each group had a dedicated, qualified and thoroughly enjoyable professional staff, headed by an effective, experienced Executive Director. Our task was to come up with recommended implementation programs for a plan put together by a group of member-leaders. Here are some of the actual "goals" adopted by these committees:

"Increase the Association's influence with all important constituencies and affiliated organizations"

"Enhance the Society's image with its various publics"

"Become recognized as the spokesperson for our profession" (No, I didn't add the emphasis, it was really part of the document)

"Ensure the maximum level of member benefits at the lowest possible cost"

What Is This Stuff???

Look, association leaders need to exert some leadership here. We need to make our members focus on real, identifiable, and worthwhile goals and objectives. Association staffers need direction, not directives. We need to help members make tough, perhaps unpopular decisions on where in the heck our organizations are trying to go and how do we know when we get there! Don't accept goals like "increase" or "enhance" unless they are accompanied by statements like "until we have XXX total members" or "with a goal of placing a voting member on at least four certifying Boards."

Be bold. Have real, challenging and achievable goals. Half (or more) of the fun of association leadership work is actually accomplishing something by working hand-in-hand with our members. That means planning and working toward having five good years, not one good year five times. Identify what success looks like, then develop a plan to achieve it. A real plan, with practical steps to accomplish specific, important goals that will provide real benefits to the industry or profession in general and the members individually.

Don't Just Do "Stuff"

## **Don't forget the Mid Year Meeting and CSE Rereat**

### **Midyear Meeting**

The NABE Program Committee, chaired by Executive Director John Norwine of the Cincinnati Bar Association, has assembled an impressive array of speakers and topics for your Midyear Meeting Feb. 8 through 10 in Salt Lake City.

### **Salt Palace Workshop Program**

Take advantage of the spectacularly helpful array of programs and speakers assembled for you during the Administration & Finance Section Salt Palace Workshop! In fact, it would be ideal to have three people from your association register for the event, since concurrent programs have three pertinent, dynamic topics in each of the areas of Budget & Finance, Administration, AND Human Resources.

### **CSE Retreat**

Get a chance to break out of your office, step away from your desk, your staff, your board, your members . . .

The Chief Staff Executive Retreat gives you a great opportunity to leave the office for a short period of time and plug in and reconnect with your peers.

## **30-second drill**

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

- Consider asking some of your newer members to serve as "greeters" at your next function. It is a non-threatening way for these new people to meet others and to feel more a part of the organization.
- To attract more members to your upcoming conference or meeting, send an e-mail from the featured speaker that says "I'm looking forward to meeting you at the conference."