

Executive Summary:

2012-2013 Fall Leadership Meeting for Section Chairs, Chairs-elect & Treasurers

Background

As part of ongoing support to the Section Leaders, the staff of the Washington State Bar Association (WSBA) hosts two leadership meetings per year which are typically scheduled at the beginning ("Fall Meeting") and the mid-point ("Spring Meeting") of the WSBA section membership year. The Fall Meeting is scheduled near the start of the year (Oct 1-Sept 30). The 2012-2013 Fall Leadership Meeting took place on November 7, 2012 under the theme of *Tools for Leading a Strong and Successful Section*. The information below provides a summary of the meeting content. Please also see the meeting materials, including the agenda, PowerPoint slides, and other handouts by visiting the Section Leaders Toolbox on the WSBA website (www.wsba.org) or contacting your section liaison.

Welcome & WSBA Mission Overview

Paula C. Littlewood, WSBA Executive Director

Paula C. Littlewood, WSBA Executive Director, welcomed the attendees and provided an overview of the WSBA mission, guiding principles, and strategic goals. She explained the Board of Governor's current process as they start to engage in strategic planning for the next three-year cycle. Paula also explained the governance structure within WSBA and the role the Supreme Court plays. She also provided a chart in which she went over the various WSBA entities, including but not limited to, committees, boards, councils, task forces, and panels. Paula also distinguished the role that sections play, with an emphasis on their importance to WSBA in providing a key touch point between the bar and its members. Attendees had the opportunity to ask questions in closing.

Current Landscape of Sections

Stacy Holmes, Senior Section Leaders Liaison

Stacy Holmes, Senior Section Leaders Liaison, started by going the over the benefits of sections to WSBA members and the public. Some of these benefits included high-quality CLE seminars, professional networking opportunities, list serve discussions, and newsletter/legal publications. While reviewing some annual statistics with the attendees, Stacy pointed out that there are currently 16,406 section memberships being held by 9,846 individuals, and 344 executive committee members that lead the 27 sections. She went on to say that the executive committee

members remain some of WSBA's most dedicated volunteers, as well as leaders and advisors to peers and public. In closing, Stacy went over the goals of the sections team which are focused on:

- Creating 27 active and sustainable sections
- Supporting pipeline of future leaders
- Strengthening and maintaining internal capacity

As part of their materials, attendees were provided with 2011-2012 Annual Report on Section Activities.

Nuts & Bolts of Section Business

Paris Seabrook, Section Leaders Liaison & Melina Lambuth, Sections Administrative Assistant

<u>Elements of Success</u>: effective executive committee, Action Plan, Resources and Member Outreach

Paris Seabrook, *Section Leaders Liaison*, identified four elements of success, the first of which was having an effective executive committee. She discussed the importance of planning ahead in meetings and succession, as well as emphasized the section leaders' toolbox, section leaders list serve, and *SectionLand* newsletter as tools to help the executive committee be effective.

Paris also talked about having an action plan, and how it helps in identifying section goals. Paris pointed out that each section should include member outreach as a priority in their action plans. Utilizing the membership data provided by WSBA, each section can determine the location of their members, other identified practice areas, and growth rates for their section. This information can be used to create targeted mailings, and establish outreach opportunities. Paris shared the new WSBA Sections brochure that the sections team put together as a resource for the sections in marketing WSBA sections. Paris also talked about the monthly financials, and budget and fiscal policies as being important tools to keep the section budget on track.

Tools of Communication: e-blasts, membership rosters, newsletters, list serves, and website Melina Lambuth, *Sections Administrative Assistant*, spoke to five key tools of communication available to section leaders, and the associated timelines for each. She began by talking about e-blasts, one of the most commonly used forms of communication between the executive committee and section members. Melina emphasized that these take up to a week to get out the door once requested. As Paris had discussed, the section also has the option of requesting membership rosters. These can be used for marketing and communication, but also for collecting data on the section's membership. Typically, these can be pulled together in less than one week. Newsletters are another tool that most sections utilize. These can be disseminated in either hardcopy or electronic format. Melina talked about newsletters having the longest timeline associated with them, as each newsletter must be edited by 3 different departments before they can be sent out to the membership. The final 2 forms of communication Melina discussed were list serves and the WSBA website. She emphasized that list serves are an *immediate* form of communication from the executive committee to its members. The website is also another quick

way to get information out to members and potential members. Melina is in charge of all section webpages, and can usually post information/ photos within 48 hours. In closing, Melina made reference to the Section Leaders Toolbox and the documents posted regarding membership outreach and communication.

For any questions about these or other policies and procedures please contact your section Liaison (Paris Seabrook, pariss@wsba.org; Stacy Holmes, stacyh@wsba.org).

Communication Policies & Tools

Debra Carnes, Chief Communications Officer

Debra Carnes, *Chief Communications Officer*, began by sharing the four goals of the WSBA Communications Department:

- 1. To maintain a member-centric focus in WSBA communications
- 2. To speak with one voice in messaging and positioning
- 3. To integrate our efforts across the organization
- 4. To maintain a proactive approach

In order to achieve these goals, Debra talked about maintaining a strategic focus and standards of consistency. She posed such questions as "who is your intended audience?" and "what are you trying to achieve with this communication?" as starting points for the executive committees as they develop their communications to their section members.

Debra reviewed the communication options put forth by the WSBA, including the new additions of the sections brochure, updated homepage, and the WSBA blog (NWSidebar). In closing Debra talked about the ways in which the sections and communications department can work together, emphasizing that her department is available to be a resource to the sections, as well as:

- Support in developing/maintaining a presence on the WSBA Blog
- Integrate section voices into the overall WSBA social media strategy
- Develop branded templates for brochures and other materials.

Debra closed by offering an opportunity for the leaders to ask questions.

Legislative Process for Sections

Kathryn Leathers, Legislative Liaison

Kathryn Leathers, *Legislative Liaison*, provided an overview of her role in working with the state legislature and the role of the WSBA section executive committees in the legislative process. Kathryn reviews every bill introduced during session for its impact on the practice of law. Bills involving major policy issues facing the WSBA are generally dealt with by the Board of Governors (BOG). Bills involving a specific practice area are referred directly to the sections for comment and recommendations as to whether the BOG should take action.

Kathryn emphasized the limitations of the WSBA role with regards to GR-12 and the WSBA Legislation & Court Rule Comment Policy. Specifically, GR-12.1(c) indicates that the WSBA and its

Sections may only take positions on political or social issues that "relate to or affect the practice of law or the administration of justice".

Attendees were advised that their Executive Committees need to be highly organized and have a clear system for review and comment of legislation that is referred to their section. There is often high volume and extremely short timelines.

Kathryn also walked attendees through the process of drafting and submitting original legislation from the sections which is a very time-intensive process that starts in the spring for the following legislative session in January.

Section-Sponsored CLE's

Kathy Burrows, Seminar Development Specialist

Kathy Burrows, Seminar Development Specialist, provided an overview of the policies and available support that relate to section-sponsored CLE seminars. In general, for full and half-day seminars, the section leaders focus on the seminar content and the recruitment of faculty, while the WSBA staff take care of marketing and a comprehensive list of logistics. Expenses, including facility and administrative overhead, are covered by the registration fees and any profits/losses are split between section budget and CLE Dept budget (Plan A). For some established annual programs, the section budget retains 100% of profit/loss (Plan B). Kathy provided a detailed handout that explained the administrative overhead expense that is calculated as part of the profit/loss calculations (see materials packet).

Kathy also explained how "mini-CLEs" are different than the full and half-day seminars. These member-benefit programs are shorter (1-2 hours), free/low-cost, and the majority of the logistics are taken over by the section itself, with WSBA staff covering only essentials.

Kathy's recommendation to attendees for best practices in developing CLE's included the following:

- 1. Start early and stay on schedule
- 2. Provide Seminar Chairs with topic ideas and your networks for quality faculty
- 3. Set the faculty up for success
- 4. Communicate with the WSBA staff
- 5. Enjoy the process!

Next Steps/Closing Remarks

Stacy Holmes, Senior Section Leaders Liaison

At the end of the meeting, Stacy invited any final comments or questions, asked for meeting evaluation feedback via the evaluation forms, and thanked the leaders for their dedication to their members.

THANK YOU to all who participated in this Spring Leaders Meeting! **The Spring Leaders Meeting is** scheduled for May 1, 2013.

For questions or comments about this meeting or other section business, please contact the WSBA Section Team:

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