
HOW TO PASS THE TORCH: EFFECTIVE CONTINUITY & LONG RANGE PLANNING FOR VOLUNTARY BAR ASSOCIATIONS

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LEARNING OBJECTIVES

1. Describe the benefits of a transition plan for leaders in voluntary bar associations
2. Develop a continuity and long-range plan for transitioning from your office/position in your voluntary bar association

DEFINITIONS

“Passing the Torch” - “To go onwards by or past”; “To run extend, or lead through, over”; To transfer or exchange or be transferred or exchanged; relinquishing responsibilities, a tradition, practice, or knowledge to another.”

BENEFITS OF EFFECTIVE TRANSITION, CONTINUITY & LONG RANGE PLANNING

I. BENEFITS FOR THE BAR ASSOCIATION

- Critical for the long-term growth of the bar association;
- Improves quality of the bar association, because **building** and **growing**, not re-creating or re-treading;
- Minimizes loss of momentum and accomplishments of the association;

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- Instills confidence of membership because of consistency;
- Energizes membership and leaders because the association is always improving, not stagnating or regressing;
- Encourages more volunteers. Volunteers are un-paid, so time is precious and time is money. If volunteers have fundamental systems in place that have been refined over the years, then volunteers are not wasting time figuring out the basics, and are able to spend time instead on building, growing, improving, or expanding. Volunteers see that their time is respected, and are more apt to volunteer if the road has been paved, as opposed to declining to take on projects or positions because of the huge time commitment involved if they have to create or become familiar with the entire process without a road map.
- Increases fundraising dollars from advertisers/investors. Advertisers/investors want to put dollars in events/associations with a track record of proven quality programming/events.

II. BENEFITS FOR THE OUTGOING LEADER

- Sense of accomplishment and closure;
- Continuation of good stewardship of the association;
- Vested interest in seeing the association succeed in the future by having been a part of the association's past;
- Innate “love for the association” and a bond with its members as well as a genuine desire to see it succeed and grow;
- Inspirational & a legacy for incoming leaders;
 - “Most people in life will be remembered in work and in life for just a few words or deeds that made a difference to others; the way leaders choose to say good-bye and move on is one of the ways they are remembered - departure can be inspiring to the organization.” -Andre Mamprin

- Ensure that leader’s programs, policies, and successes of his/her term do not diminish with the next administration/leader.

III. BENEFITS FOR THE INCOMING LEADER

- Building and focusing on new growth as opposed to re-creating the wheel on fundamentals or wasting precious time and energy on “basics” or learning the position;

- Gaining valuable insight from the past, avoiding pitfalls and/or continuing successes;

- Learning from the experience of previous leaders;

- Minimizing confusion, and maximizing organization;

- Finding out what has worked best for this organization and what is not worth the time, money, and energy.

REASONS WHY EFFECTIVE TRANSITION DOES NOT OCCUR

- No continuity or long-range transition plan in place

- Misperception as to Time Involved for an Effective Transition

- “Last Minute” & Fleeting Thought - Leaders are so focused on their position and leading the association for the year in the position, and transition is just a fleeting thought!

- Sheer Exhaustion from Office

- Misdirected ego/pride - “I want to go down in history as the best” syndrome, but if a President paves the way for the next President, it will benefit that person and the organization, which will make history!

DEVELOPING AN EFFECTIVE CONTINUITY & LONG-RANGE PLAN FOR TRANSITIONING

I. ORGANIZATIONAL STRUCTURE OF THE BAR ASSOCIATION

Develop an organizational structure that supports leadership development. Identify potential leaders in the organization early. Allow these leaders to chair or take responsibility for an event or project. One of the best organizational structures that promotes continuity and long-range planning for an association is one that requires (two) years as a director on the Board, then service as Secretary, Treasurer, President Elect/Vice President, before becoming President. This process fosters continuity in the association because leaders have experience and long-term knowledge of the association's operations, programs, etc. Ideally, the out-going leader (e.g., President) will also remain on the association's board as an immediate past president in a transition role. Having the "immediate past president" on the Board in this capacity still allows the new president the freedom to make changes or build from the prior administration, but allows for the experience and information transfer needed from the prior president.

II. SHADOWING

Throughout the outgoing leader's term, encourage and welcome the incoming leader to observe meetings and/or the operation of key functions of the outgoing leader's position.

III. TRANSITION MEETING(S)

Immediately following the transition of leadership, or close to the end of the term of the out-going leader, a transition meeting between the out-going leader and the in-coming leader is important. This allows for the information & knowledge transfer to take place, as well as the incoming leader to ask questions. This meeting is time-sensitive, and should not wait a month or more after the leadership transfer has taken place because information will not be fresh, nor very useful at that point.

The meeting should be in-person so follow-up questions may be asked. If leaders attend the Voluntary Bar Leaders Conference, the transition meeting may occur there. This is oftentimes a convenient time and place. Other bar associations may plan specific retreats for transition meetings.

At this meeting, the below information & knowledge transfer will take place. The outgoing leader should be accessible by phone or e-mail to answer any questions of the incoming leader during the upcoming year of the new administration.

IV. INFORMATION & KNOWLEDGE TRANSFER

For every event, program, and position in the bar association, it is critical for the continued viability and growth of the association to have a centralized and permanent information base (other than simply the outgoing leader's memory) to pass along for generations to come. If information and knowledge is preserved, this can become a very valuable resource and foster longevity and growth. Outgoing leaders may move locations or forget key information. Moreover, incoming leaders may feel like they cannot approach outgoing leaders for whatever reason, including the perception they are "bothering" former leaders.

In the past, passing along information in bar associations has been done by putting critical information in hard copy notebooks. However, these notebooks may erroneously be viewed as "not critical" and tossed out by bar staff over the years, etc. Not to mention, creating notebooks is a time-consuming process, and space for storing/housing these notebooks may be a huge challenge.

With today's technology, all that is required is a flash-drive or the cloud! A *de minimus* time commitment on the outgoing leader's part is required if the outgoing leader starts now (beginning his/her term), and simply saves information to the flash drive or to the cloud as he/she goes along throughout the year and while it is still fresh in the outgoing leader's mind. This process will also help the "outgoing leader" as well because the information he/she needs throughout his/her term will be

readily accessible on the flash drive or in the cloud. The flash drive or the cloud may be updated and added onto as the years go on. Of course, it is recommended that a back-up be made of the flash drive in case of loss of the flash drive, etc. The “cloud” is the better option because it cannot be lost and is accessible anywhere at any time.

V. SPECIFIC INFORMATION TO INCLUDE IN THE CLOUD AND/OR ON THE FLASH DRIVE (CHECKLIST):

- Association’s Constitution & Bylaws
- Leader’s Responsibilities as Stated in the Constitution & Bylaws
- Current Forms Related to the Events/Programs/Position
- Calendar of Deadlines/Events for the Past Year
- Agendas/Minutes
- Organization’s letterhead
- Organization’s logo
- Current Membership list
- List of key contact e-mail addresses
- Membership Application
- Registration Form
- Dues Notice

Outgoing Leader: _____

Position: _____

1. Accomplishments realized during your term and reasons for their success:

2. What did you try that worked well? Would you suggest doing it again? Why or why not?

3. What did you try that did not work well? Why and what would you do differently if you had the opportunity?

4. What challenges did you encounter this past year as part of the position? Do you have any suggestions of ways to avoid or correct these challenges?

5. List 3 things that you wish you had known prior to taking the position:

1)

2)

3)

6. List 3 goals that you would have liked to accomplish, but did not:

1)

2)

3)

7. Are there any projects left pending? If yes, what should be done immediately?

8. What would you like your successor in this position to build upon?

9. Do you have any suggestions for increasing efficiency and effectiveness in this position?

10. What was the highlight of your term?

11. List any other suggestions that you feel would be helpful to your successor in carrying out the responsibilities of this office ...