PABE
Survival Guide
for
Bar Leaders
INTRODUCTION

The Pennsylvania Association of Bar Executives (PABE) was founded in the early 1980s. Its membership includes individuals serving in an executive capacity for a bar association or lawyer membership organization within the Commonwealth of Pennsylvania.

One of PABE’s major goals is to provide assistance to voluntary bar leaders in Pennsylvania. This Survival Guide has been assembled by PABE as a resource for present and future bar leaders in cooperation with PBA’s Conference of County Bar Leaders.

The Survival Guide addresses 20 areas of interest to all bar associations. It won’t provide all the answers, but the information can be used to steer volunteers and staff in the right direction. Perhaps more importantly, the members of PABE responsible for writing individual chapters welcome your call should you wish to discuss the topic further with them.

<table>
<thead>
<tr>
<th>Presidents</th>
<th>Pennsylvania Association of Bar Executives (PABE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1986 - 1987</td>
<td>Elizabeth C. Price, Executive Director, Delaware County Bar Association</td>
</tr>
<tr>
<td>1988 - 1989</td>
<td>Margaret R. Halfpenny, Executive Director, Chester County Bar Association (Retired)</td>
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<tr>
<td>1990 - 1991</td>
<td>Barbara I. Kittrell, Executive Director, Berks County Bar Association</td>
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<tr>
<td>1992 - 1993</td>
<td>James I. Smith, III, Executive Director, Allegheny County Bar Association (Retired)</td>
</tr>
<tr>
<td>1994 - 1995</td>
<td>Patricia M. Martin, Executive Director, Bucks County Bar Association</td>
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<tr>
<td>1996 - 1997</td>
<td>Evelyn E. Sullivan, Executive Director, Lancaster Bar Association</td>
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<tr>
<td>1998 - 1999</td>
<td>Sandra Brydon Smith, Executive Director, Erie County Bar Association</td>
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<tr>
<td>2000 - 2001</td>
<td>Marianne S. Canning, Executive Director, Bar Association of Lehigh County</td>
</tr>
<tr>
<td>2002 – 2003</td>
<td>Arthur J. Birdsall, Director of County Bar Services, Pennsylvania Bar Association</td>
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# A Survival Guide For Bar Leaders

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Chapter 1
ASSOCIATION BYLAWS
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<table>
<thead>
<tr>
<th>Chapter Title:</th>
<th>Chapter Title:</th>
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<tr>
<td><strong>Why Needed:</strong></td>
<td>Bylaws are the internal rules of an organization. They are meant to provide basic regulations, understandable to your membership.</td>
</tr>
<tr>
<td><strong>Drafting:</strong></td>
<td>Draft your Bylaws at the beginning of the organization’s existence. Appoint a Bylaws Committee to help with the drafting and with amendments in the future.</td>
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<tr>
<td></td>
<td>It’s not advisable to just copy another organization’s Bylaws or use “canned” ones, but do review those of other organizations as references.</td>
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<tr>
<td></td>
<td>Keep your Bylaws basic while still trying to anticipate areas that could cause conflict or discussion in the future. Try to find a balance between restrictions that are so tight you lose flexibility and looseness that creates vagueness.</td>
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<tr>
<td></td>
<td>Remember that your Bylaws are not the place for trivial or temporary matters. Nor should they go into great detail on how, for example, a particular committee should proceed when it meets. Such direction and detail, essential for continuity within the organization, is better kept in a procedures binder or in a particular committee’s file for reference.</td>
</tr>
<tr>
<td><strong>Amendments:</strong></td>
<td>Your Bylaws should provide a procedure to allow for amendments. Your Bylaws Committee should be responsible for drafting the appropriate language for an amendment or revision, and submitting it to the proper authority for consideration and potential adoption. Extensive Bylaw amendments are known as revisions.</td>
</tr>
<tr>
<td><strong>Miscellaneous Comments:</strong></td>
<td>Purchase a copy of <em>The Modern Edition of Robert’s Rules of Order</em>. It will provide you with details on how to run all your meetings and has very helpful information on by-laws, including sample by-laws. In fact, most of the information contained in this chapter has been taken from <em>Robert’s Rules of Order</em>.</td>
</tr>
<tr>
<td></td>
<td>Along with your Bylaws, you may want to keep a notebook of standing rules. These are policies or procedures adopted by your governing board, but don’t belong in your Bylaws. It is helpful to keep them together for reference since similar or related matters often come before your board again and again, and the standing rules notebook can save time and help keep from “reinventing the wheel.” An example of a standing rule would be that two signatures are required on checks written above a specific amount.</td>
</tr>
</tbody>
</table>
Chapter 2
BAR ASSOCIATION FINANCES
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Chapter Title: Bar Association Finances

Preparation: Comments in this chapter will assume the Association has at least a personal computer. Any bar association, even if unstaffed, will be much further ahead to own or have access to a computer (even if access is through the president or treasurer’s office). The computer will pay for itself over and over again in time saved even if used only for word processing and finances.

A bar association needs to produce not only an annual budget, but financial reports for its governing board and membership.

Budgets

Budgets can be quite sophisticated or as simple as line items showing income and expenses. They consist of a combination of known income and expenses as well as projections and do take considerable time to calculate with any degree of accuracy. Drafting a budget gives you an eye into the future and can help answer such questions as, “Do we need a dues increase?”, “Can we afford to subsidize this program during its first year?”

Many software packages allow you to compare your budget figures to your actual income and expenses, and can provide this information in printed reports easily understood by your Board.

Financial Reports:

Financial reports provided to your board keep them informed of where the income is coming from (or not) and where the expenses are going (or not). They provide your board with the opportunity to analyze where improvements and adjustments can be made if projected revenues aren’t being realized as expected, expenses are higher than anticipated or that excess revenues in one area may be of assistance in another.

Typical financial reports generated from a financial software package include income and expense reports, trial balances, balance sheets and/or general ledger reports, accounts payable, accounts receivable.

Finance Committee:

A Finance Committee that meets quarterly is a good safety net for the Association. This committee consists of the Association’s Treasurer and 2-3 other members with a strong financial background (perhaps they are also CPAs). The Finance Committee’s job is to scrutinize quarterly financial reports as only they can do. Such scrutiny is not typically done by the governing board that reviews the weekly or monthly reports provided them since often they don’t have the financial background necessary to do so. A Finance Committee needs to spend no more than 3-4 hours total per year doing their job.
Financial Software: Listed below are software packages used by some of the staffed bar associations in Pennsylvania. The contact person listed can discuss the pros and cons of the system they use, and perhaps would provide examples of reports that can be generated. At least several of these packages can be purchased for less than $100.

<table>
<thead>
<tr>
<th>Financial Software Package</th>
<th>Bar Association</th>
<th>Association Membership (appr.)</th>
<th>Contact Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Plains</td>
<td>Allegheny County</td>
<td>6,700</td>
<td>Dave Leonard</td>
</tr>
<tr>
<td>Peachtree</td>
<td>Berks County</td>
<td>600</td>
<td>Jeanne Behm</td>
</tr>
<tr>
<td>Peachtree</td>
<td>Bucks County</td>
<td>650</td>
<td>Wanda Kester</td>
</tr>
<tr>
<td>Quickpen</td>
<td>Centre County</td>
<td>165</td>
<td>Bruce Fleischer</td>
</tr>
<tr>
<td>Peachtree</td>
<td>Chester County</td>
<td>900</td>
<td>Daniel Start</td>
</tr>
<tr>
<td>Quickbooks Pro</td>
<td>Cumberland County</td>
<td>350</td>
<td>Becky Morgenthal</td>
</tr>
<tr>
<td>Peachtree</td>
<td>Dauphin County</td>
<td>1,388</td>
<td>Joan Kramer</td>
</tr>
<tr>
<td>MAS 90</td>
<td>Delaware County</td>
<td>1,250</td>
<td>Ann Lordi</td>
</tr>
<tr>
<td>Quickbooks Pro</td>
<td>Erie County</td>
<td>520</td>
<td>Sandra Brydon Smith</td>
</tr>
<tr>
<td>Quickbooks Pro</td>
<td>Lackawanna County</td>
<td>666</td>
<td>Michael Keegan</td>
</tr>
<tr>
<td>Peachtree 2003</td>
<td>Lancaster County</td>
<td>700+</td>
<td>Evelyn Sullivan</td>
</tr>
<tr>
<td>ETEK (a/k/a MTX – integrates with Microsoft software)</td>
<td>Montgomery County</td>
<td>2,000</td>
<td>George Cardenas</td>
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<td>Computer Associates</td>
<td>Monroe County</td>
<td>225</td>
<td>Susan Kenny</td>
</tr>
<tr>
<td>BP II</td>
<td>Norhampton County</td>
<td>482</td>
<td>Stephanie Pasquel</td>
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<tr>
<td>Peachtree</td>
<td>Washington County</td>
<td>308</td>
<td>Kathy Sabol</td>
</tr>
<tr>
<td>Quickbooks Pro</td>
<td>Westmoreland County</td>
<td>500</td>
<td>Diane Krivoniak</td>
</tr>
<tr>
<td>Access</td>
<td>York County</td>
<td>438</td>
<td>Jean Bednarski</td>
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</tbody>
</table>

Executive Directors of local bar associations are glad to share information about their current software packages as well as experiences they may have had with other packages. There are excellent “off the shelf” packages available for under $100. For example, the Erie County Bar Association (5,004 members) uses One-Write Plus. It offers a general ledger, accounts receivable/payable, billing, check writing, reports, balance sheets, payroll, taxes, etc.
Chapter 3
BENCH-BAR CONFERENCES
by
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Bench Bar Conferences

Introduction

Bench Bar Conferences provide an opportunity for the members of the Bar Association and the Bench to interact outside of the courtroom. The Conferences vary widely among the counties and are designed to suit the needs of the members. They range anywhere from a half day conference to a several day trip to distant locations. Bench Bar Conferences typically include both an educational component and a social component.

Advance Preparation

1. Appoint a Committee or Task Force whose responsibility it will be to work with the staff and Board to plan the meeting.

2. Identify what your members anticipate getting out the meeting and design your programs and activities based on those expectations.

3. Consider developing a theme for the meeting and designing the materials, programs and activities based on that theme.

4. Develop a budget to determine what it will cost to put on the conference. Based on that budget, determine how you plan to cover those costs and whether the revenue you generate must cover the entire cost of the meeting. Some of the typical income and expense categories include:

<table>
<thead>
<tr>
<th>Income</th>
<th>Expense</th>
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<tbody>
<tr>
<td>Registration Fees</td>
<td>Food &amp; Beverage</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>Supplies</td>
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<td>Exhibitors</td>
<td>Entertainment</td>
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<td></td>
<td>Staff Cost</td>
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<td></td>
<td>Speakers’ Fees</td>
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<td></td>
<td>Hotel Rooms</td>
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5. Solicit sponsorships from local businesses that may have an interest in marketing to your members and determine how those sponsors will have access to your members during the meeting.
Planning the event

Below is a list of ideas and recommendations that you may want to consider as you begin to “nail down” the details for your conference.

1. Registration materials can motivate individuals who may not have considered attending the meeting.
   a. Design them around the theme if you have one
   b. Put as much detail about the programs and activities as you can in those materials.
   c. Get them out well in advance of the meeting (2 months)
   d. Offer a discounted or “early bird” registration rate
   e. Follow them up with email reminders to the members
   f. Place follow-up calls to major firms who have not registered and individuals who have attended in previous years.

2. Work closely with the event planners from the facility in which you are holding the meeting. They do this for a living and can be an invaluable resource in making sure the event comes off without a hitch. Some of the items to coordinate with the facility representatives include
   a. Audio Visual needs
   b. Entertainment venues
   c. Recreational activities
   d. Food and beverage details
   e. Room block and reservation updates
   f. Meeting room usage and setup
   g. Special amenities for VIPs

3. Prepare a detailed “punch” list of items that must be done in preparation for the meeting. Include the deadline for completion with each item.

4. Begin collecting handouts as early as possible from presenters. Consolidate those materials into a notebook and/or onto a CD Rom so members will have them for later use. This little step can have a very big impact with your members.

5. Send confirmation letters to all presenters and entertainers to ensure they are aware of the time and day of their presentation.

6. Develop an evaluation form for attendees to fill out. Be sure to tabulate the results and share it with the individuals who helped plan the event.
Chapter 4
CONDUCTING A SUCCESSFUL MEETING
by
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E-mail: patm@bucksbar.org
How many times have we heard “Committees are the lifeblood of any volunteer organization? While we recognize the validity of the statement, it is often overlooked that in order for a committee to be successful, the meetings held by that committee must be successful. Only then, will the actions of the committee be effective and satisfying for the committee members. A bar leader’s responsibility is to make sure that if the committee members have made the commitment to serve on the committee, they will have something worthwhile to accomplish. For this reason, committee meetings need to be run in an efficient and productive manner.

Advance Preparation

Notice to members – Be sure that committee members are given enough notice of the upcoming meeting; two weeks is usually satisfactory. Use of broadcast faxing or the Internet is quick and cheap.

Agenda – Including the agenda with the notice gives the members an idea of what to expect as well as reminding them of responsibilities they may have for the upcoming meeting. Include names of those who are expected to give a report or provide information at the meeting. It is a good idea to put the most important items early on the agenda. This encourages your members to arrive on time. Setting time limits for agenda items will also keep attention focused on the agenda. Including support material for major issues or those that will be voted upon is a good idea.

Minutes of Previous Meeting – With the rising postage costs, many associations try to keep mailings to a minimum. You do want your members to know what transpired at the previous meeting (especially those who were unable to attend). One alternative is to post committee meeting minutes on your website or fax them to committee members. Whatever, be sure to have extra copies on hand at the meeting for those who have not read them.

Financial Reports – Provide this information either in the minutes or as part of the agenda. Have extra copies at the meeting if appropriate.

The Meeting

Organization – Always start your meetings on time. This rewards those who were prompt and assures that tardy members who realize the meeting started without them will be on time at the next meeting. If there is no regular secretary, appoint one early in the meeting. Minutes are the only way to keep from discussing the
same business over and over again. A different member can be appointed scrivener for each meeting or you may find one committee member who is willing to assume the responsibility for the year.

**Discussion** – Give the members plenty of time to discuss issues without allowing discussion to drag. Make sure that all of the members have an opportunity to be heard. Once the same things are being said over and over again, call for a consensus from the group as to how to proceed. Move onto the next item.

**Review** – Before the meeting concludes, review and summarize all the decisions and assignments. If possible, set deadlines for completion of tasks assigned during the meeting. Make sure everyone knows who is responsible for what. Set the date and time for the next meeting – better yet - at the first meeting of the year, schedule meeting dates for the entire year and just remind the members of the date for the next meeting at the close of the current one.

**Scheduling** – Do not allow meetings to go on too long. One hour is usually plenty of time for a committee meeting. On the same vein, although it is important to hold committee meetings during the year, if quarterly meetings are sufficient for your particular committee, do not hesitate to hold quarterly meetings instead of monthly meetings. Nothing kills member interest in a committee than attending meetings which serve no purpose.

A good meeting means that the members feel a sense of accomplishment and purpose and will make a real effort to attend the next one. A bad meeting leaves the members feeling frustrated and discouraged as to their role on this committee.
Chapter 5
COOPERATION WITH
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COOPERATION WITH OTHER PROFESSIONAL ORGANIZATIONS
Marianne S. Canning, Executive Director, The Bar Association of Lehigh County

“Win-win” is an apt way of describing the development and maintenance of good relationships and cooperative efforts between bar associations and organizations from other professions. Pursuing such efforts is more than worthwhile as an ongoing function of your local bar association and benefits derived through increased communication, education, and good public relations can be invaluable both to your association and to your individual members.

Most bar association cooperative activities with organizations from other professions involve medical or medical related associations, accountant organizations, realtors groups, or other law-related associations. These activities generally center around social meetings, educational programs, or a combination of the two. These are a good way to start and there are some innovative cooperative projects happening too!

If your bar association doesn’t have an inter-professional program in place, how do you start? First, meet the leaders of the organization and give them the opportunity to meet your members. Invite the presiding officer of the professional group to be a guest at one of your bar association’s regular social events: your annual dinner dance, banquet or picnic. Be sure your president, or a designated member of your association, meets and serves as host to your guests to make them feel welcome and introduce them to your members. Accept their reciprocal invitation.

How can you develop, reinstate or maintain cooperative inter-professional activities? Organize a joint event between the organizations. Plan a program on a topic of mutual interest or concern. Involve representatives from both professions as program providers to allow for expression of differing ideas and perspectives. Include a question, answer and discussion opportunity for expression of viewpoints. Arrange for pre or post program refreshments and encourage members to mix and get to know each other on an informal basis. Use name tags to identify all attendees and their organization.

What about education? In this day of mandatory continuing professional education, a joint education program is a great way to encourage attendance and a larger mix of attendees and also to provide a service to the participating organizations. Arrange for continuing education credit to be granted to all professionals attending. (This is particularly appropriate for programs involving lawyers and accountants or insurance agents.) Try using another agency, e.g. a government agency, to serve as a catalyst and as an additional presenter for an education program of benefit to the participating organizations.

Unique programs have been developed by some associations which encourage the development of understanding of viewpoints and concerns. “Intern” programs invite members of a different profession to spend a day (or more) side-by-side with another professional during their work day. This has been proven to be a well-received way to
gain an appreciation of the demands, problems, and rewards of the other professional’s job.

Use your ingenuity to plan cooperative ventures which may be unique to your locale or situation to achieve a goal of shared ideas and gained understanding. The results will be for the mutual Is benefit of the participating professionals, their organizations, and ultimately the clients they serve.
Chapter 6
DEVELOPING A WEB PAGE
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DEVELOPING A WEB PAGE
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The Web Page is certainly one of the newest tools for association communications in the 21st century. In this era of rising postage costs and increased expectations of instant communication, just how does an association get from wanting to employ this tool to making it happen? Unless you are willing to invest a fair amount of time and money at the start, you may end up with a web site that languishes for lack of attention and serves no real purpose – other than embarrassment to your association. Avoid creating a site just “because other bar associations have”.

Originally, installing a web site meant learning a whole new language (HTML) and being well versed in the computer world. Now there are software programs that enable anyone with some degree of computer literacy to create and maintain a simple web page. What are the steps necessary to enable your association to develop a web site, which serves your members and your public?

- Establishing a Technology Committee with some of the more technically oriented lawyers should assure the project’s success.

- Deciding whether there is in house talent to design and create the site or if outside resources will be necessary. If time is not an issue, consider contacting local community colleges or computer schools for promising students who could use this as a school project. In some instances, there may be a member of the association who would like to take on the project for the association. This can be very satisfactory, but you are at the mercy of his/her abilities and time constraints. Finally, there are numerous individuals/companies advertising on the Internet and in the Yellow Pages you can contract with to set up and/or maintain your site.

- Determining WHAT your site is going to contain must occur even before you decide WHO is going to develop your site. This must come from the Committee. It is pointless to bring someone on board if you are still undecided as to the content of your site. Take a look at other bar association sites. (Editor’s note: A list of all the Pennsylvania bar association web sites has been provided for you at the end of this article.)

- Developing a long and short-range plan for your site is crucial. Set up a wish list of all the things you would like to eventually see on the site. This does not mean that everything will be on the site the first day. Starting small is a good idea. Too much too soon can lead to frustration. As with many projects, as time goes on, ideas and goals will change. Decide in order of importance what you want to see on your web site.
Certain portions of the site will remain static. That is they do not change. These are relatively simple to set up and include such things as Directions to your facility, Legal Links to other Web sites, your Local Rules, and perhaps a Welcome from the President. Other portions need to be maintained/updated on a REGULAR basis. Any kind of scheduling, i.e., CLE offerings, Committee Meetings, Social Events must be current. The quickest way to turn your members away from your site is not keeping it up to date. Listing the date of your last change(s) to the site is a good way of informing visitors how current the information is. Decide early on just how often the site will be updated. If the membership knows the site is updated weekly or every other Monday or whatever, they will develop the habit of checking it on a regular basis.

One of the most difficult things to accomplish is getting your members used to opening your Web page on a regular basis. Providing information about your CLE programs, committee meetings and social events is a start. Since that is also information they can find elsewhere, it takes time for them to use this resource. One suggestion, which has worked with some associations, is to include lots of pictures on your site. If the membership knows that the pictures from the dinner dance will be up on the site the following week, your can bet they are going to check them out (if only to see if their picture is there)! On a more serious vein, Links you establish with other sites, especially legal research sites will also draw a number of hits.

How do you find out what sections of the site are most important? You can insert a counter on each page of your website or your Internet Service Provider can provide this information. It is a good idea to track this information over a period of time, say six months, to see what is most popular. It is entirely possible that something the Committee thought would be well received is of no interest to the members or the public. Your members are busy; they are not going to spend time on your site if they find nothing of importance to them or if they can’t find what they are looking for very quickly and easily. This will be an ongoing project and for it to be successful, the Committee needs to constantly reevaluate the site as to content and appearance. Surveying the membership on a regular basis for their thoughts and opinions is important. Using this method of communication is very effective and shows the association is staying current in informing its membership.
Chapter 7
IOLTA
by
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Account Board
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IOLTA

On July 17, 1996, the Supreme Court of Pennsylvania amended Rule 1.15 of the Pennsylvania Rules of Professional Conduct to establish a mandatory Interest on Lawyers’ Trust Accounts (IOLTA) program. The action of the court suspended the opt out IOLTA program created by Pennsylvania statute in 1988 and substituted in its place the Court administered mandatory IOLTA program.

Pennsylvania became the 27th state to implement such a mandatory program. The rule amendment requires lawyers to place all fiduciary funds they handle into interest-bearing status either to benefit the owner of the funds, or for qualified funds, the IOLTA program. The rule amendment was effective September 1, 1996. Implementing regulations are codified at Title 204 PA Code Chapter 81.

THE IOLTA CONCEPT

Clients and others frequently transfer money to lawyers to hold. When the amount is large or if the funds will be held for an extended period of time, lawyers invest them for the benefit of the client. But when the funds are small or expected to be held for a short time, they cannot practically be invested to benefit the owner of the funds.

The rule amendment of July 17, 1996 to Rule 1.15 of the Pennsylvania Rules of Professional Conduct created the mandatory Interest on Lawyers Trust Account (IOLTA) program and requires lawyers to pool these nominal and short term funds in interest-bearing IOLTA accounts. The result is that funds that would otherwise earn no interest can be put to constructive use.

The lawyer’s bank transfers the interest earned on IOLTA accounts, no less frequently than quarterly, to the IOLTA Board. The Board distributes the IOLTA funds for the delivery of civil legal assistance to the poor and disadvantaged, educational legal clinical programs and internships administered by law schools, the administration of justice, and for the administration and development of the IOLTA program.

COMPLYING WITH IOLTA

An “Enrollment Form for Lawyers and Law Firms” is used to direct the lawyer’s financial institution to convert all of his/her pooled fiduciary trust accounts to interest-bearing IOLTA accounts. The second copy of the enrollment form should be submitted along with a list of all the lawyers who use the IOLTA accounts in the regular course of their practice, to the IOLTA Board.

On an annual basis as part of the licensing process, lawyers are required to certify compliance with Rule 1.15 of the Pennsylvania Rules of Professional Conduct regarding the handling of funds and
other property of clients and others and the maintenance of their IOLTA accounts.

EXCLUSIONS AND EXEMPTIONS

A lawyer whose employment does not result in the handling of fiduciary funds will generally be excluded from IOLTA. Examples include corporate or governmental lawyers, judges, and law school professors as long as they do not maintain a private practice.

Additionally exemptions can be granted by the IOLTA Board. A lawyer can write to the IOLTA Board if he/she believes any of the permitted exemptions apply. Exemptions will be granted if:

A. the nature of the lawyer’s practice does not require the routine maintenance of a trust account in Pennsylvania;

B. the establishment of an IOLTA account would work an undue hardship on the lawyer or would be extremely impractical, such as the absence of an approved financial institution in the lawyer’s geographical area; and

C. the lawyers historical annual trust account experience, based on information from the depository institution in which the lawyer deposits trust funds, demonstrates the service charges on the IOLTA account would significantly and routinely exceed any interest generated.

NON-COMPLIANCE

If a lawyer does not comply with the requirements outlined in Rule 1.15 of the Pennsylvania Rules of Professional Conduct he or she will be subject to the same disciplinary penalties as any lawyer who does not comply With any of the other requirements for the practice of law in Pennsylvania.

QUALIFIED FUNDS

Qualified funds are fiduciary monies received by a lawyer in the practice of law that in the good faith judgment of the lawyer, are nominal in amount or are reasonably expected to be held for such a short period of time that sufficient interest income will not be generated to justify the expense of administering a segregated account.

A lawyer will not be liable in damages or held to have breached any fiduciary duty or responsibility because monies are deposited in an IOLTA account pursuant to the lawyer’s judgment in good faith that the monies were qualified for deposit in an IOLTA account.
<table>
<thead>
<tr>
<th>TAXES ON IOLTA INTEREST</th>
<th>The Internal Revenue Service (IRS) has ruled that there are no tax consequences to the client, the lawyer or the IOLTA Board for interest earned on IOLTA accounts. Also, there is no IRS reporting requirement for the lawyer, financial institution or client since all IOLTA accounts will use the Tax Identification Number of the IOLTA Board.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEPARATE ACCOUNT FOR CLIENT FUNDS</td>
<td>In the past, lawyers have soundly exercised their discretion in determining whether a given trust deposit was of sufficient size or duration to justify its placement in a separate interest-bearing account, with the interest payable to the owner. The amendment to Rule 1.15 does not affect the lawyer’s discretion in this matter. Indeed, the Rule amendment requires lawyers to decide whether a separate interest-bearing account should be established to benefit the client or owner of the funds.</td>
</tr>
<tr>
<td>FINANCIAL INSTITUTIONS AND IOLTA</td>
<td>Financial institutions are not mandated to participate in IOLTA. However, financial institutions that wish to be depositories into which lawyers can deposit fiduciary funds, must be approved by the Supreme Court of Pennsylvania. A list of such approved financial institutions can be obtained from the IOLTA Board. It is anticipated that all approved financial institutions will offer IOLTA accounts. IOLTA accounts are interest-bearing checking accounts with interest paid at no less than the financial institution’s rate paid on negotiable order of withdrawal (NOW) or super-negotiable order of withdrawal accounts. The financial institutions remit the interest at least quarterly to the IOLTA Board. The financial institutions must also notify the lawyer of the service charges or fees deducted, and the amount remitted from the lawyer’s IOLTA account.</td>
</tr>
<tr>
<td>SERVICE CHARGES ON IOLTA ACCOUNTS</td>
<td>Service charges for an IOLTA account will be paid by offsetting the service charges against interest earned on that account. If service charges exceed the interest earned, the excess service charge will be offset against interest earned on other IOLTA accounts maintained at the same depository institution. Charges pertaining to the lawyer’s practice (e.g. check printing charges, overdraft charges, charges for temporary extensions of credit, etc.), and cost billable to others (e.g. overdraft charges on deposited items, certified checks, wire transfers, etc.) are the responsibility of the lawyer.</td>
</tr>
</tbody>
</table>
| HOW IOLTA FUNDS ARE USED | Interest earned on IOLTA accounts may be used only for the following purposes:  
1) delivery of civil legal assistance to the poor and disadvantaged;  
2) educational legal clinical programs and internships |
administered by law schools;
3) the administration of justice; and
4) the administration and development of the IOLTA program.

All disbursements and allocations of IOLTA funds are subject to the prior approval of the Supreme Court of Pennsylvania.

THE IOLTA BOARD

The IOLTA Board is the Pennsylvania Interest on Lawyers Trust Account Board composed of nine members appointed by the Supreme Court of Pennsylvania. Two members are selected exclusively from a list provided to the Court by the Pennsylvania Bar Association.

IOLTA CONSTITUTIONALITY

On June 15, 1998, the U. S. Supreme Court announced a decision in a Texas case, *Phillips, et al. v. Washington Legal Foundation, et al.*, which may ultimately impact the Pennsylvania IOLTA program and similar programs nationwide. Chief Justice Rehnquist authored the 5-4 majority opinion, which Justices O’Connor, Scalia, Kennedy and Thomas joined, concluding that Texas law observes the “interest follows principal” doctrine and interest income earned on client funds held in Texas IOLTA accounts is private property of the clients. The Court did not eliminate or enjoin the IOLTA program, instead, the case was sent back to the lower courts to decide whether the State of Texas has “taken” the private property in violation of the Fifth Amendment, and if so, whether compensation must be made for it. It may take years for the decisions on these two issues to work their way through the courts. In the meantime the IOLTA rules in every state and the District of Columbia remain in effect.

The Pennsylvania IOLTA Board believes that the property laws of Texas and Pennsylvania are different, and that the U.S. Supreme Court has postponed consideration of the most salient premise of the IOLTA program, that clients do not sustain any economic loss as a result of IOLTA. As Justice Souter observed in his dissent which was joined by Justices Stevens, Ginsburg, and Bryer, even if the Court were to find a taking, it is hard to imagine that any “just compensation” is due. During oral argument even Justice O’Connor opined that “... it might turn out at the end of the day there’s no taking. No damages, no loss, no taking.”

No court has found that IOLTA is unconstitutional, including the U. S. Supreme Courts decision of June 15, 1998. While the IOLTA Board is studying the opinion to determine if it should recommend any adjustments in Pennsylvania, the program continues to function as usual. Lawyers are expected to continue to comply with the Pennsylvania Supreme Court’s lawful rule concerning IOLTA and
grants that provide for the civil legal representation of the poor continue to be administered.
Chapter 8
LAW DAY ACTIVITIES
by
Daniel Stark
Executive Director
Chester County Bar Association
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West Chester, PA 19380
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**Law Day/Law Week**

Law Day takes place on May 1<sup>st</sup> of every year during Law Week. During that week, County Bar Associations undertake a number of activities designed to educate the public about the law and the legal profession. Typically, the local associations design those activities around a common theme developed by the Pennsylvania Bar Association. Along with the theme, the PBA also produces a packet of information that is useful in planning your events.

**Activities**

Below is a listed of activities you and your Committee may want to consider for Law Day and throughout Law Week.

**Adult Activities:**
- People’s Law School Events
- Radio Call-in Shows
- Speaker’s Bureau
- Editorial Board Visits
- Bookstore/Library Displays
- Legal Expos
- Telephone Legal Lines
- Courthouse Tours
- Meet Your Judges
- Luncheons
- Theme related Awards to members

**Student Activities:**
- Essay Contest
- Mock Trial Team Recognition
- Poster Contest
- Scholarship Awards
- Law Related Education Activities
- Pamphlets or Brochures for Kids
- Law Exploring activities

**Planning**

In planning activities, Local Bar Associations may want to consider some of the following suggestions.

1. Recruit volunteers to assist the staff in developing the program.

2. Be sure to plan your activities based on the audience you are hoping to reach.

3. Begin the planning process as soon as the theme is released.

4. Develop a timeline to ensure you have ample time to accomplish everything in preparation for the event and help the volunteers focus on the details.

5. Develop a budget to ensure that you are being realistic about the costs and revenue that it will generate, if any.
6. Include the members of the Bench in the planning and implementation of the activities.

7. Include volunteers from outside the legal profession in the planning process to ensure you have participation from the community at large on the days of the events. For example, school district representatives, local legislators, corporate representatives, etc.

8. Ask participants to complete an evaluation of the event so the volunteers who worked on the Committee have some feedback to improve future events.

9. Send invitations to participants well in advance of the events and consider having the letter come out under multiple signatures, including officers and judges.

Other Resources

American Bar Association – www.abanet.org/publiced/lawday/
Pennsylvania Bar Association – www.pabar.org
Chapter 9
LAWYER REFERRAL SERVICE

TRADITIONAL
By
Elizabeth C. Price
Executive Director
ecp@delcobar.com

ELECTRONIC
By
Tracy E. Lochetto
tracy@delcobar.com

Delaware County Bar Association
Front & Lemon Streets
Media, PA 19063
(610) 566-6627
A lawyer referral service is designed to assist persons of modest to moderate means, but whose ability to locate appropriate legal representation is frustrated by a lack of experience with the legal profession, a lack of information about the needed service, and/or a fear of the potential costs of seeking legal help.

**Advance Preparation**

A lawyer referral service is usually operated or sponsored by a local or state bar association. Most services are administratively similar and basically offer the same type of service. Within the framework of the bar association, a lawyer referral committee is appointed to determine the type of service that will be afforded to the public, staffing, drafting of rules and regulations, screening of attorney panel members, registration fees for panel attorneys, client consultation time period, and fee for the attorney/client initial consultation period.

**Plan**

The committee should adopt minimum quality standards for the referral service that incorporate client protection features such as: admission criteria for participating panel attorneys and importantly, a requirement that participating panel attorneys maintain malpractice insurance coverage. Usually lawyer referral programs are restricted to bar association members in good standing with the Supreme Court of Pennsylvania.

Lawyer referral programs service the community in many ways in addition to promoting good public relations. When appropriate, the service can refer clients to other service organizations and, more importantly, provide the client with an unbiased referral to an attorney who has experience in the area of law appropriate to the client's needs. Attorney panel members designate the areas of law they wish to be listed.

An annual or semi-annual fee is usually charged to the participating attorney panel members. Some charge their members a percentage of fees collected from the referral and some require that a portion or all of the consultation fee be returned to the service. For those charging a percentage of the collected fee, it would be wise to consult with one of the association's tax attorneys for a legal interpretation of the tax imposed on unrelated business income--Internal Revenue Service (LTR 7952002), 1979 Ruling--Section 511. Any income can be used to finance the administration and the advertising of the lawyer referral service.

Referrals are made by telephone or by personal interview. A lawyer’s fee and length of time for the initial consultation between the attorney and client is established by the service. The fee is usually nominal ($10 to $25) and the consultation period 30 to 60 minutes.

Clients are not obligated to retain the referred attorney, and many contact the service for another referral. A type of reporting system should be established for the attorney panel members so that the service can relay the appropriate information regarding number of referrals, client satisfaction, and any client complaints.
The legal system should be accessible to every person. A lawyer referral does that by providing the clients with an unbiased referral to an attorney who has experience in the area of law appropriate to the client’s need.

ELECTRONIC LAWYER REFERRAL SERVICE

Submitted by Tracy E. Lochetto

A call to duty in the twenty first century has your Bar Associations implementing information technology and enhancing the practice of law in local counties by providing the public with access to the law and members of your association via the internet.

Namely, an Electronic Lawyer Referral Service (ELRS) provides the general public the opportunity to present legal issues electronically to a qualified attorney, quickly and confidentially. The service provides its members and the public with access to the law, lawyers, and other legal resources 24 hours a day, 7 days a week. Visitors can obtain legal representation without leaving their home or office via an Electronic Lawyer Referral Service on your association’s web site. The ELRS selects an attorney for consultation from a database based on the location and area of practice designated by the visitor. The Association’s web site should also have a Member Directory so visitors can look for a member by name, location, area of practice, or any combination of the three. This directory provides links to members’ e-mail and personal web pages, and allows the visitor to browse the credentials of each member and contact those with whom they wish to communicate.

An Electronic Lawyer Referral Service and implementation of future Internet applications is an extension of what you might consider a “traditional” type of lawyer referral service, where a potential client contacts your association by phone or “walk-in” to find a lawyer. You may support the theory that an Electronic Lawyer Referral Service is the future of referring lawyers; however, large, national, third-party lawyer referral services may be unable to sufficiently address all of the specific wants and needs of local lawyers and members of the community. The best resource for lawyer referral and CLE Seminars continues to be your local bar association.

When establishing an association’s web site and supporting services such as ELRS, you must keep in mind that you are targeting a “new” market for those lawyers, residents and business persons, locally and nationwide, that have the ability and means to access electronic services. If so, be assured that these services not only increase your members’ exposure to the public, but enhance public access to the law. Your association’s site, from which ELRS is accessed, might include a legal resources area that provides many law-related links or areas for conducting both law-related Internet searches, and general Internet searches. You are now educating the public. The result, well informed members of the public capable of performing some of their own research prior to contacting a lawyer which often provides a certain level of confidence, or comfort to those seeking legal advice.
In developing any service where the objective is to best meet the needs of your association’s members and members of the community, most importantly, focus on information technology that increases the flow of communication between the two. Constantly strive to improve your systems and address the wants and needs of your visitors.

**ELRS in General.** All members accessible via an Electronic Lawyer Referral Service are dedicated to excellence in the practice of law, and have embraced technology in order to provide an extraordinary service. They are licensed and insured professionals and should agree to respond to the needs of those community members accessing the service.

When a visitor, or potential client “clicks on” an ELRS button in a menu selection, they are taken to a page on a secured server and communication from that point is encrypted until one leaves the secured server that handles ELRS. Regardless, it is suggested that a user does not reveal information over the internet that should be kept confidential. First, a user must determine whether their question is general or specific. General questions DO NOT concern real persons, places or events. Members of your association should believe in making the law accessible to all. To that end, general questions are answered free of charge. General questions may include where to file a legal document, or governing statutes, rules, and regulations. Specific questions DO concern real persons, places, or events. An electronic lawyer referral system allows the user to identify whether their legal question is general in nature or whether it involves real persons, places, or events. If the question is specific in nature, the user may only provide factual information required for a proper check for a conflict of interest.

Lawyers will only consult with a user after determining that the consultation will not create a conflict of interest. After such a determination is made, the user will be given the opportunity to limit the lawyer selection process by indicating a particular area of the law and/or geographic location and provide contact information. The data provided will be forwarded by encrypted e-mail, to a lawyer selected from the database based on the criteria selected by the potential client. A response will be provided to the user within 48 hours, at a maximum. Subsequent to this point of contact, it is the responsibility of the attorney and the potential client to further discuss the specifics of the case and the associated legal fees.

The cost to an attorney for participating in an Electronic Lawyer Referral System is established by your local bar association. Your association may choose to charge participating attorneys an annual referral fee in addition to a one time set up fee. The referral fee is based upon the attorney’s selection of a “plan”, again established by your association, which may include a listing in a Civil Plan, a Criminal Plan, or participation in a combination of the two. After carefully considering a variety of plan offerings and which of your members should participate (those attorneys who participate in your traditional referral service or total membership), your association may find it more cost effective, and certainly easier to implement, a plan which provides the Electronic Lawyer Referral Service to all members of the association as a “value add” to their membership.
Namely, your Electronic Lawyer Referral Service and other electronic services would be provided to the association’s entire membership, free of charge as part of their annual dues.
Chapter 10
LONG RANGE PLANNING
by
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“Would you tell me please which way I ought to go from here?” said Alice.
“That depends a good deal upon where you want to get to,” said the cat.
“I don’t much care where,” said Alice.
“Then it doesn’t matter which way you go,” said the cat.

Lewis Carroll, *Alice in Wonderland*

In today’s world of limited volunteer time, limited financial resources and growing needs, bar associations no longer have the luxury of leading a reactive rather proactive existence. Long range planning, or strategic planning, has become a necessity for the operation of an effective and efficient organization.

Peter F. Drucker defines strategic planning as “the application of thought, analysis, and judgement” It is the best tool available to cope with or capitalize on change. Unfortunately, according to a 1986 survey, only 38% of trade associations, professional societies and tax-exempt organizations have strategic or long-range plans.

The good news is that there are bar associations actively involved in the planning process ... and willing to share information about the “hows” and “whys” of the process. Local bars, the PBA and the ABA are excellent sources. A particularly good description of the comprehensive planning process is contained in Section 3 of the American Bar Association/Young Lawyers Division meeting notebook from the June 3, 1995, “Forum on Professional Skills Building”. (Contact ABA Bar Services for copies.)

Contained here is an example of the on-going planning undertaken by a local bar association. The sample policy establishes a planning calendar which enables the leadership to assure that the budget is reflective of the goals and objectives of the association rather than the reverse. Reviewing the plan each year guarantees re-evaluation and re-commitment to the goals and objectives, while allowing for adjustments to the plan.

Long range planning provides the structure and direction for growing organizations with constantly changing leadership.
SAMPLE
LONG RANGE PLANNING POLICY
LONG RANGE PLANNING POLICY

A. Development of each one-year Plan of Work. After the meeting of the Board of Directors in February each year the Long Range Planning Committee shall initiate an updating of the Plan of Work for the succeeding calendar year, based on existing goals (subject to any changes in those goals that may be adopted by the Board of Directors, with counsel from LRPC). Each committee and section shall by May 15 describe those objectives and action steps that are necessary to implement the goals for the coming calendar year.

B. A Three-year Planning Cycle. At least every three years a full review and update of the plan shall be completed. This shall be initiated by a listing of Facts and Perceptions regarding Bar activities as developed at a joint meeting of the Long Range Planning Committee, Board of Directors and Committee chairs (possibly at the Annual Bar Conference). The meeting shall be announced in the Bar newsletter so that any member of the Association may attend. Based on these Facts and Perceptions they Directors shall then adopt a new set of goals. These goals (subject to ongoing revision as necessary) shall then become the basis for the plans of work that will annually be adopted for each of the next three years until the next assessment of facts and perceptions is accomplished.

C. Rationale. It is intended that the above described planning process will allow the Directors as the governing body to be the entity that establishes the goals of the Association. It was not thought necessary that the Directors devote major effort to gathering information each year. If the Directors devote significant attention every three years, it was anticipated that the Long Range Planning Committee could work within that established framework for several years (subject to amendment by the Directors at any time) until a new gathering of facts and perceptions was necessary.

D. Planning Steps. A chart illustrating Planning Steps, schedule and responsibility is attached.
<table>
<thead>
<tr>
<th>Overview</th>
<th>Planning Steps</th>
<th>Scheduled</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>DESCRIBE OUR SITUATION AND WHAT WE WANT TO DO IN RESPONSE</td>
<td>1. <strong>Facts and Perceptions</strong> about LBA.</td>
<td>Annually at February Board Meeting, with full assessment done every three years</td>
<td>Board of Directors and Long Range Planning Committee</td>
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<td>2. <strong>Assessment</strong> of each fact/perception.</td>
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<td></td>
<td>Is it positive, negative, or partially both</td>
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<td>3. <strong>Classification</strong> of facts/perceptions through key words. Key words in the current plan of work are:</td>
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<td></td>
<td>I. Improve Judicial System</td>
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<td></td>
<td>II. Judicial Selection Process</td>
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<td></td>
<td>III. LBA Participation/Collegiality</td>
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<td></td>
<td>IV. LBA Administration/Service</td>
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<td></td>
<td>V. Public Service/Legal Service to Poor</td>
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<td>VI. Legal Competence/Ethics</td>
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<td>VII. Leadership in Law-Related Issues</td>
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<td>VIII. Public Perceptions of LBA/Lawyers</td>
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<td>4. <strong>Goals</strong>: the desired end result – the WHAT</td>
<td></td>
<td></td>
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<td></td>
<td>5. <strong>Opportunities and Problems</strong> related to each goal.</td>
<td>April 1 to May 15</td>
<td>Committees, Sections, Board of Directors, and Executive Director</td>
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<td></td>
<td>6. <strong>Objectives</strong>: the means to reach each goal.</td>
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<tr>
<td></td>
<td>WHEN, WHAT, WHERE</td>
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<td>7. <strong>Action Steps</strong> to achieve each objective.</td>
<td></td>
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<tr>
<td></td>
<td>when, what, where, WHO, and HOW</td>
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<tr>
<td></td>
<td>8. <strong>Resource Evaluation</strong>: determine the cost of the action, steps in time expertise, and money.</td>
<td>June 15</td>
<td>Long Range Planning Committee and Board of Directors</td>
</tr>
<tr>
<td></td>
<td>9. <strong>Operational Plan of Work</strong>: revise action steps to come within limits of time, expertise, and money. Assign priorities to goals.</td>
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<td></td>
<td>10. <strong>Replan</strong> each year thereafter.</td>
<td>February Board Meeting</td>
<td>Long Range Planning Committee Chair, President, and Exec. Director</td>
</tr>
</tbody>
</table>

36
SAMPLE
LONG RANGE PLAN
REPORT OF THE
LONG RANGE PLANNING COMMITTEE

GOAL I: PARTICIPATE WITH THE JUDICIAL SYSTEM IN PROMOTING
THE FAIR ADMINISTRATION OF JUSTICE.

OBJECTIVE I: Protect, preserve and promote improvement where
necessary of fundamental elements of fair judicial process.

Strategies:

1. Encourage members to participate in any formal structure responsible for
review of and recommendation to existing local procedural rules committees of suggested
modifications to Local Court Rules and practices.

2. Advocate, when necessary, for an adequate number of active and senior
judges to efficiently and effectively handle court case loads.

3. Advocate and support a fair and effective disciplinary system for judges
and lawyers.

4. Advocate for making the Lancaster County judicial system more sensitive
to all participants, including witnesses.

5. Establish a mechanism for communicating with the minor judiciary to
resolve inconsistencies in practices and procedures among the district justice offices.

6. Determine whether the LBA should, as an organization, respond to
proposals with regard to changing the judicial system, including the establishment of a
commerce court and other systemic reforms.

OBJECTIVE II: Establish a communication structure responsible to deal
with and respond to the media to assure open, accurate and responsible coverage of the
judicial system.

Strategies:

1. Speak against unjust criticism of the judiciary, the judicial system and its
participants.

2. Support and respond to just criticism of the judiciary and its participants
when necessary.

3. Cooperate with the Court in dissemination of information to the public.
OBJECTIVE III: Refocus *attention to* the bench/bar conference as an educational and social vehicle for the exchange of information between bench and bar to foster the mutual respect, understanding and collegiality among the participants which is vital to a fair, just and efficient system of judicial administration.

GOAL II: PARTICIPATE IN THE SELECTION PROCESS TO PROMOTE THE CHOICE OF QUALIFIED JUDGES.

OBJECTIVE I: Maintain the process of evaluation in cases of election/retention of Judges.

Strategies:

1. To prepare and present an informational program about the roles of judges and district justices and their respective qualifications.

GOAL III: ENCOURAGE GREATER PARTICIPATION BY ALL MEMBERS IN THE ASSOCIATION AND ITS ACTIVITIES AND PROMOTE THE COLLEGIALITY OF THE PROFESSION.

OBJECTIVE I: Encourage an orderly succession mechanism of bar committees’ and sections’ chairs and vice chairs.

Strategies:

1. President-elect to seek advice from current Board of Directors, President and committee chairs regarding candidates for respective chairs.

2. President-elect to assure that invitations to fill committee and section chairs are made by the first day of office.

3. Board of Directors to develop policy for orderly succession and rotation of chairs.

OBJECTIVE II: Establish a mechanism for reviewing LBA Committees.

Strategies:

1. LBA Board of Directors review, at least every other year, and monitor activities of all committees vis-a-vis LBA’s overall goals and objectives (review the vitality of the then-existing standing committees and sections).

2. Assure that each committee develops its own goals and objectives in addition to goals and objectives to meet LBA’s goals and objectives (review whether each committee is assigning itself functions and tasks in accordance with goals and objectives of the current Board of Directors and *LBA* President).
3. Review, every other year, whether there is a need to consolidate/dissolve/expand/maintain the existing committee structure.

4. President to assess status of committees, request semi-annual reports from committee chairs and request action from inactive committees in accordance with the established goals and objectives of the LBA.

OBJECTIVE III: Encourage and acknowledge participation by LBA members and firms to work on committees, sections or other public activities and programs of the Bar.

OBJECTIVE IV: Coordinate the social, educational and service activities of the LBA’s Committees, Sections and membership-at-large in an effort to promote the collegiality of the Bar and to develop a program of activities to reach all Bar members.

OBJECTIVE V: Monitor completion of basement and encourage its full utilization for educational and social activities.

GOAL IV: SERVE THE MEMBERSHIP AND IMPROVE THE MANAGEMENT AND ADMINISTRATION OF THE ASSOCIATION

OBJECTIVE I: Establish a membership committee to consider expansion of benefits to members and classification of members.

Strategies:

1. Elicit and consider suggestions from membership with regard to the expansion and/or improvement of services and benefits to LBA members.

OBJECTIVE II: Maintain a manual which records all policies adopted by the LBA.

OBJECTIVE III: Encourage participation in the Lawyer Referral Programs.

Strategies:

1. Review efficiency of each program and its respective mechanics.

2. Make changes appropriate to support greater participation.

3. Maintain public awareness of each program.

OBJECTIVE IV: Encourage broad participation in governance of the Association.
Strategies:

1. Increase participation at Annual and June meetings.

2. Establish a reporting schedule or mechanism for committees which takes into account the objectives of each committee, the Board and the Long Range Plan.

3. Develop job descriptions for officers and committee and section chairs.

OBJECTIVE V: Board of Directors provide committees as needed to facilitate the management of the administrative services of the LBA headquarters and staff.

Strategies:

1. Encourage the training and continued development of the administrative and support staff.

OBJECTIVE VI: Establish a Property Committee which oversees and plans for the maintenance of the Bar Headquarters.

OBJECTIVE VII: Plan for changes that computerization will have on the practice of law and the Bar Association.

GOAL V: IMPROVE THE AVAILABILITY OF LEGAL SERVICES TO THE PUBLIC INCLUDING THOSE WITH LIMITED ABILITY TO PAY.

OBJECTIVE I: Increase public awareness of existing Lancaster Bar Association and community programs, such as the Pro Bono program, Lawyer Referral Service, Fee Arbitration panels, and the Disciplinary Board of the Pennsylvania Supreme Court.

Strategies:

1. Educate the public regarding the services available through the Lancaster Bar Association.

2. Review programs yearly to evaluate effectiveness.

3. Encourage utilization of Lancaster Mediation Center and any alternative dispute resolution mechanism which may be available.

4. Evaluate the Pro Bono program and make recommendations for improvement.
OBJECTIVE II: Evaluate need for new, expanded programs such as, e.g.,
child advocacy, a prison project.

OBJECTIVE III: Encourage participation of LBA members in the Pro Bono
program and IOLTA.

GOAL VI: FOSTER THE HIGHEST COMPETENCE AND ETHICS OF THE
LEGAL PROFESSION.

OBJECTIVE I: Promote available resources for attorneys and members of
the Bar who are experiencing problems related to alcohol abuse and substance
dependency.

Strategies:

1. Encourage members to contact Lawyers Concerned for Lawyers to discuss
known abusers.

2. Continue to provide education about services available to substance
abusers.

OBJECTIVE II: Maintain local resource for ethical conduct and
professional standards.

Strategies:

1. Maintain an educational program (including textual materials) which
focuses on ethical considerations and guidance for appropriate professional conduct.

2. Plan regular meetings for the discussion of ethical issues.

3. Maintain a liaison with ABA and PBA Ethics Committees and the
Pennsylvania Disciplinary Board.

4. Maintain a liaison with appropriate MCLE governance offices as a service
to LBA members.

GOAL VII: PROVIDE INFORMATION TO THE PUBLIC ABOUT THE LAW
AND THE LEGAL PROCESS.

OBJECTIVE I: Develop programs to educate the public about the function
of lawyers and judges in the legal process and the reasons for structure of the process.

Strategies:

1. Increase involvement in public education.
2. Review existing booklets, pamphlets and handouts.

3. Develop programs to increase inter-professional understanding and the exchange of ideas.

OBJECTIVE II: Develop a “Peoples Law School” program focusing on substantive legal issues for the general public.

OBJECTIVE III: Review LBA policy on taking official positions on public issues.

GOAL VIII: PROMOTE THE CONTRIBUTIONS OF THE LANCASTER BAR ASSOCIATION AND THE LEGAL COMMUNITY.

OBJECTIVE I: Promote public service programs sponsored by the LBA.

OBJECTIVE II: Promote the public service activities performed by attorneys.

OBJECTIVE III: Communicate the goals and objectives of the LBA.

Strategies:
1. Meet with the media to provide information on the goals and programs of the LBA.

2. Issue press releases about public service activities, including some committee reports.

3. Publicize resolutions of the Board of Directors.

OBJECTIVE IV: Make LBA facility available for appropriate community activities.

Adopted 3/22/95
Chapter 11
MCLE
by
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Mandatory Continuing Legal Education

Marianne S. Canning, Executive Director, The Bar Association of Lehigh County

Continuing legal education has been a member service activity for many bar associations for a long time. However, since the onset of “mandatory” continuing legal education in Pennsylvania, interest and emphasis on local bar association CLE programming has increased and, in many bar associations, has been given additional focus as a revenue source.

Mandatory continuing legal education in Pennsylvania is administered by the Pennsylvania Continuing Legal Education Board of the Supreme Court of Pennsylvania. At present, there are almost two hundred CLE providers accredited by the PA CLE Board. These include state bar associations and their subsidiaries, law schools, specialty bar associations, various law-related organizations, government agencies, and local county bar associations. In addition to these providers, other organizations may be eligible to apply for providership on an individual program basis.

“To be or not to be”: should your bar association be a CLE provider? Local bar associations interested in assisting their members in pursuing MCLE activity have several options from which to choose: CLE providership, program-by-program accreditation, or participation in cooperative program with an accredited CLE provider.

Most bars view CLE as an important membership service but not all bar associations have sufficient staff, volunteer time, or other resources to offer CLE programming. If your association is in this latter category but you want to assist your members in meeting CLE requirements and in finding programs to meet local applications, you might consider pursuing a cooperative arrangement with a nearby provider bar association. They may be happy to accommodate the CLE needs of your members, offer you some special considerations, and “share the spotlight.”

If your bar is an accredited provider, or you plan on acquiring accreditation for some individual CLE programs, there are a number of things to keep in mind. What are the interests of the practitioners in your area? What does the court feel the practitioners could do better? Who are the local experts in these areas? What volume of attendance can be expected? Can an education program be combined with another event to accomplish dual purposes?

Local bars have the built-in advantage of being the “only show in town” that provides local programs dealing with local court rules, practices and procedures. Non-local providers find that it’s just not worth their while to come into each jurisdiction with a tailor-made program. Take advantage of this by producing timely programs that address new local issues. Network with your membership and the courts to see what issues are destined to become topics of interest. Be sure the courts are aware of your CLE providing capabilities and solicit their cooperation and participation. While your CLE committee may have the overall responsibility for providing continuing legal education, each
committee or section of your association that deals with a specific area of law is an invaluable source of program ideas.

Experiment with programming in different formats to meet different member needs. Utilize a conference retreat to provide a full year of CLE credit in a few days. Try full or half day seminars for members who want to fulfill MCLE requirements in a few sittings. One-hour breakfast or lunch programs are great for small practitioners who don’t want to take a full or half day away from the office and who can attend one of these programs each month to complete the year’s CLE requirement. Videotape your live programs and present video programs of previously presented live programs for the benefit of members who may have been unable to attend an original program on a topic of their special interest. Consider presenting “cafeteria” sessions of videotaped programs near the end of each of the three MCLE compliance periods and be sure to include an ethics, professionalism or substance abuse program on the menu. Internet utilizations area newly approved venue to review. Be creative and try a non-traditional CLE program site – on a bus, a cruise ship, or a beach in the Caribbean!

MCLE programming is “twice blessed.” It is an invaluable member service and it can be a significant source of non-dues income to your bar association. Remember that when members need MCLE, they look at price, convenience and relevance of the topics to their practices. When CLE hours are needed to fulfill mandatory requirements, what’s cheap and convenient may be the determining factors. Programming that combines economy, ease of access and excellence of content is a sure winner. In planning CLE budgets and programs, it is important to keep in mind that the success of your overall CLE program depends on how you can economically and effectively reach your members and elicit their participation.

The Pennsylvania Continuing Legal Education Board administration notes that the PA CLE Board has reaffirmed its goal of assuring a “lawyer friendly” program and asks all providers of CLE courses to join with the CLE Board in a commitment to Quality of CLE in Pennsylvania. The CLE Board office staff will be happy to answer any questions about provider or course accreditation. Telephone the CLE Board at 1-800-497-2253 or check their website at www.pacle.org.
Chapter 12
NEWSLETTERS
by
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NEWSLETTER

ADVANCED PREPARATION:
• Review by Long Range Planning Committee with assignment to specific committee
• Committee study of project with recommendations that include financial specifics, newsletter “look,” and timeline for implementation
• Board approval
• Bar staff involvement and implementation

PLAN:
WHY a newsletter?
• Provides a timely vehicle to keep bar activities and news in front of members
• Is seen as benefit to members - the members get something tangible for their dues
• Easy quick-read format to convey bar news
• Good selling tool for bar undertakings, i.e. renovation purchases, foundation fund raisers, referral service numbers, upcoming CLE seminars, bar member deaths, court administrator’s news, young lawyers activities, rule changes.

There must be a significant from the board, the committee and the bar executive to make a newsletter work.

COSTS:
• need to be considered up front and should include a budget

Don’t forget to include: mailing, printing, staff time, software and computer costs, training costs, consultant costs.

TIME:
• needs to be considered especially for these people-

An editor will need to commit several hours to each issue and he/she needs to be alerted ahead of time about all aspects that an editor’s job entails.

Proofreaders need to be recruited who are dependable and willing to make themselves available to help meet deadlines.

Bar exec will need to be committed to organize writers, collect articles, write articles, meet deadline.

Bar president will need to be sensitive to deadlines.

Printer will need to be aware of turn-around time.
FORMAT:
- Smaller bars (50-200) may find it more practical and less expensive to have a computer-generated, Xeroxed newsletter.
- Bars with 200+ members will want to provide typeset, printed newsletters with pictures and advertising.

HOW TO CUT COSTS:
- Use bar staff to proof articles.
- Layout newsletter with bar computers and desktop publishing software.
- Pay an expert to train bar staff on newsletter layout.
- Purchase scanner to scan in pictures rather than pay a printer to shoot negatives for print.
- Use bulk mailing permit.
- Design the newsletter as a self-mailer so that no envelope will be needed.

WHAT TO INCLUDE:
- Newsy columns that give information about engagements, weddings, leadership positions, gossip
- Jury verdicts
- War stories
- President’s Messages
- Committee reports
- Pro Bono updates
- Bar Foundation information
- Social activities

EVALUATE:

Be sure to get a read from the members about the publication. A survey is easy to do by including it in the newsletter. The time and money commitment is such that no bar should be publishing a newsletter that is not being read.
Chapter 13
NONDUES INCOME
by
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NONDUES INCOME

ADVANCED PREPARATION:
- Review by Long Range Planning Committee with assignment to specific committee
- Committee study of project with recommendations that Provide financial specifics and timeline
- Board approval
- Bar staff involvement and implementation

PLAN:

THERE IS NO MAGICAL, EFFORTLESS WAY TO INCREASE NONDUES INCOME. Any project that works toward increasing nondues income is going to require staff time, committee involvement, board commitment and money. There are, however, ways to increase nondues income that will merit this extra commitment of bar association resources. It is the responsibility of the bar leaders to determine the worth of undertaking any new nondues income project.

SAMPLE PROJECTS:

A recent project that has established its worth as a nondues income project to the Westmoreland Bar Association is the local rules publications. The WBA undertook this project at the request of the judges and worked in cooperation with a local college – through a grant program – to publish the rules locally and sell the finished binder through the WBA offices. The first year the bar grossed $15,750 and netted $10,000. This last year we netted $7,500 By working with our Court Administrator to share rules changes on disk, the bar staff time required is minimal. The duplication and mailing of rule changes are handled through the bar office with interference of other responsibilities.

A second worthwhile project is the bench/bar sponsorship program. At the annual bench/bar conference, businesses are permitted to sponsor an event at the cost of $500 per unit. A sampling of events opened for sponsorship include 5K run, cocktail hour, educational materials, golf, musical production. Revenue for 1995 was $15,000 for this program.

Another source of nondues income used in conjunction with the bench/bar conference is a vendor exhibit. All sponsors are given a complimentary table and dinner tickets. Other businesses are invited to rent a table at $200 each and they are also invited to attend the dinner at a cost of $50 per ticket. There are many businesses that love the opportunity to mix with lawyers and judges We hold an afternoon wine and cheese party as well as the cocktail hour right in the exhibitors’ hall so that attorneys and judges are encouraged to visit the vendors.
EXCEPTIONS TO NONDUES PROJECT:

There are also other times that the board will – and should – undertake nondues projects for the “good of the bar” rather than for any financial gain. An example of this is the Lawyer Referral Service. This is a project that “just” sustains itself at the Westmoreland Bar Association. With 125 attorneys -joining this service in 1995 at a cost of $125 each, the nondues income generated was $14,500 (a discount was offered for new members). Expenses for this program included yellow page advertising, a pamphlet marketing program, telephone, salary and office supplies.

No substantial profit is earned or expected. However, the board knew this when they brought this project on board. The Lawyer Referral Service is a service that promotes our local attorneys and offers help for local citizens. It is deemed a worthwhile project because of the “good” it does our association. It is not evaluated for its worth as a nondues revenue earner.

OTHER IDEAS:

A survey conducted recently by the ABA cited the most popular source of potential nondues revenue as CLE and placement services. Other ideas include increasing rates for advertising in bar publications, renting out meeting rooms in bar’s facilities, and selling mailing lists.
Chapter 14
OFFICE/EMPLOYEE MANUALS
by
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OFFICE PROCEDURES MANUAL/PERSONNEL POLICY MANUAL

Bar Associations are organized for a twofold purpose – to serve the members and to serve the public. In order to accomplish these functions in an efficient manner, the need for an office procedures manual and a personnel policy manual take on added importance. With a change of governance each year, the responsibility for the smooth, continuous operation of an Association office rests with the staff, under the leadership of the Executive Director.

It is suggested that Association offices consider the compilation of a monthly diary of “to do” items. The easiest way to accomplish this task is to record every function performed during a certain time frame and then compile the information in the form of a monthly or even weekly diary. There are a number of software packages available to assist with this project. Needless to say, the staff is aware of the day-to-day routine in an office, but deadlines occurring quarterly, semi-annually or annually often can be overlooked. As Association offices take on added functions each year, it is important to have a quick reference to determine when the process of organizing new committees should begin, when the copy machine service contract expires, when invitations to functions should be sent, etc.

In addition to the diary, a procedures manual for the office is helpful in that it can explain in detail how each function is performed, such as the admission of new members, the guest list for social affairs, or the contacts for building maintenance and repairs. The rationale for a procedures manual is for efficiency and for direction if there is a turnover in staff. Updating of the manual is an ongoing process because Association functions are constantly being expanded and modified. On the following page is a suggested Table of Contents for a manual as prepared for the Northampton County Bar Association.

Also included in pages following is a suggested outline for a Personnel Policy Manual which assists both the Personnel Committee and the Executive Director in working with the staff. Copies of the Personnel Policy Manual, as well as Job Descriptions, will be shared with interested parties.
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NEWSLETTER

BUILDING SYSTEM

SECURITY SYSTEM
AIR CONDITIONING
FIRE EXTINGUISHERS
HEATING AND PLUMBING
TELEPHONE
INSURANCE
MAINTENANCE
PARKING
OFFICE EQUIPMENT
LAW LIBRARY EQUIPMENT

FINANCIAL INFORMATION

BANKING
ACCOUNTING
QUARTERLY RETURNS
Chapter 15
PBA
by
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THE PENNSYLVANIA BAR ASSOCIATION

Incorporated in 1895 as a non-profit corporation, the Pennsylvania Bar Association was founded to advance the science of jurisprudence; to promote the administration of justice; to see that no one, on account of poverty, is denied his or her legal rights; to secure proper legislation; to encourage a thorough legal education; to uphold the honor and dignity of the Bar; to cultivate cordial relations among the lawyers of Pennsylvania; and to perpetuate the history of the profession and the memory of its members.

Membership in the PBA can be obtained either individually or through the Unit County Plan, which offers members a graduated dues discount when the county bar association elects to collect PBA dues for all of its members and makes a single, bulk payment to the PBA. There are 65 county bar associations in Pennsylvania, and 50 of them maintain Unit County status.

HOUSE OF DELEGATES

Created in 1966, the House of Delegates is charged with setting PBA policy. All voting rights of PBA members are exercised through the House, including the right to vote on matters affecting the substance and administration of PBA policy or on amendments to the Articles of Incorporation or the Bylaws. The House also has the authority to judge the election and qualifications of its own members, controls all membership dues and approves increases.

House membership consists of voting and non-voting members. County bar presidents nominate voting delegates for a three-year term. Each of the 12 PBA zones can nominate one delegate for every 100 PBA members. Nomination forms are mailed to each county bar president in January, and nominations are returned by March.

In general, House voting privileges are enjoyed by:

- General Officers of the Association;
- other members of the Board of Governors;
- the president of each local Bar Association or the nominee of the president who shall be a member of the local Bar Association;
- one member from each of the 12 zones for every 100 active PBA members in that particular zone;
- one additional member from each of the zones in which every local bar association has adopted the Unit Plan of Membership;
- the living former Presidents and the five living former Chairs of the House of Delegates who have most recently held office as Chair;
- the living former PBA Secretary and former PBA Treasurer who have most recently held those offices; and
one additional member from each Zone appointed as a Young Lawyer Zone Delegate under section 904 of the Bylaws.

The following members of the House of Delegates have the same rights as the voting members, except that they are not allowed to vote, nor are they allowed to appeal a ruling of the House Chair:

- Delegates representing the PBA Sections;
- other former Chairs of the House of Delegates;
- other former members of the Board who have held Board offices within the past three Association years;
- the Pennsylvania State Delegate to the House of Delegates of the American Bar Association;
- the Attorney General of Pennsylvania;
- the Court Administrator of Pennsylvania;
- Deans of the Pennsylvania law schools and also former deans of Pennsylvania law schools as long as they maintain membership in the Association; and
- one representative (who is an Active Member of the Association and who is not otherwise a voting member of the House of Delegates) appointed by any statewide organization of attorneys, which organization is approved by the House of Delegates and which has at a minimum one hundred members of the Bar of the Supreme Court of Pennsylvania, one or more of whom practice in each Zone.

The House meets at least twice a year, in the spring to coincide with the Annual Meeting and in the fall. These meetings are held at least four months apart, the exact dates and places to be determined by the Board of Governors, unless ordered otherwise by the House. Special meetings of the House may be called either by the Board of Governors or upon written request of 10 percent of the voting delegates of the House. The secretary must send written notification of the special meeting no less than 30 days before the meeting to each delegate and to each Section or Committee Chair.

In general, House meetings are open to the public. The House, however, may choose to close a session or an entire meeting to the public. Both local bar associations and the PBA sections/committees may submit reports to the House. These reports must be submitted in writing, copies of which are to be made available to the delegates before or at the time the report is presented, if possible. Although reports from the local bar associations are submitted to the House through the Chair prior to the meeting, reports from sections and committees should be transmitted through the Board of Governors.
The Board of Governors manages and carries out PBA policies as established by the House of Delegates. Between meetings of the House, the Board may perform any functions of the House, with the exception of duties specifically reserved for that body.

The Board is charged with drafting, administering and approving the Association’s budget. The Board also is responsible for overseeing PBA Sections and Committees and for the transmittal of their reports to the House. The Bylaws also require the Board to develop plans that will make PBA more useful to its members. The Board generally will make recommendations to the House on specific issues and will determine the Association position on public issues and litigation affecting the legal profession. All actions taken by the Board are reported to the House at its next meeting.

The Board of Governors is also authorized to enter into contracts that will bind the Association. The Board may authorize any of the Association’s officers or other agents of the PBA to enter into binding agreements, and this authority may be general or may be limited by the Board to certain areas.

Each year, the Board of Governors is required to present a report to its members that contains details concerning Association assets and liabilities, revenues and expenses, and the status of PBA membership. This report, which must be verified by the PBA President and Treasurer, is filed with the minutes of the House meetings.

The Board is comprised of the following members:

- PBA General Officers (President, President-Elect, Vice President, Chair of the House of Delegates, Secretary and Treasurer);
- the immediate past President;
- three representatives from the Young Lawyers Division (the Chair, Chair-Elect and the most recent living past Chair);
- one Zone Governor from each zone;
- two Governors-At-Large, one representing minorities and the other representing women.

The Board’s membership is proportioned among the geographic zones in the Commonwealth, in contrast to the House of Delegates. Twelve Board members are Zone Governors, each representing one of twelve zones in the Commonwealth and serving a three-year term. Four new Zone Governors are elected each year. County bar association presidents – who must be in office 90 days before the PBA Annual Meeting – nominate candidates for Zone Governor from within their zone. Elections are conducted by PBA through a mail ballot in zones where there is more than one nominee and all PBA members within the zone are eligible to vote. The PBA president appoints the at-large governors – one woman and one minority – for two-year terms. The Board of Governors must approve the nominees.
The Bylaws require the Board to meet immediately prior to the PBA Annual Meeting and the PBA Midyear Meeting and immediately after each Annual Meeting. In practice, however, the Board generally meets six times a year, including prior to the Fall Meeting of the House of Delegates.

**COMMITTEES**

To better serve its members and carry out Association business, the PBA has established committees. Committees may be established by the House, the Board of Governors or the PBA president. Each March, PBA members receive a mailing listing all of the PBA committees, through which they are asked to sign-up for committees of their choice. Immediately prior to assuming the term as President, the PBA President-elect appoints all members of committees and each committee Chair and Vice Chair. The PBA President, President-Elect, Vice President, Chair of the House of Delegates and Executive Director are ex officio non-voting members of all committees.

The committees set their own schedules for regular meetings, and the committee chair calls special meetings upon the written request to the PBA President of a majority of the committee.

**SECTIONS**

There are currently 18 sections, but the Bylaws provide that the House may establish additional sections upon a petition from active members. The current sections are:

- Administrative Law
- Aeronautical and Space Law
- Business Law
- Civil Litigation
- Criminal Law
- Education Law
- Elder Law
- Environmental, Mineral and Natural
- Family Law
- Intellectual Property Law
- International and Comparative Law
- Labor and Employment Law
- Municipal Law
- Public Utility Law
- Real Property, Probate and Trust Law
- Resources Law
- Solo and Small Firm Practice
- Tax Law
- Workers’ Compensation

Any PBA member may become a member of a section by annually paying the appropriate dues. Each section is run by a Chair, Vice Chair, Secretary and any other officers established by that section’s bylaws. Sections may require their members to pay dues, subject to the approval of the Board of Governors, and these dues may be used to defer the costs of any section activity.
YOUNG LAWYERS DIVISION

The PBA Young Lawyers Division is a part of the larger professional association and represents approximately one-quarter of the Association’s membership.

Membership in the PBA/YLD is automatic for lawyers 36 years of age or younger, or newly admitted to practice for five years or less regardless of age. The PBA/YLD is dedicated to providing services for its members and also to providing public service programming for a variety of worthwhile causes.

THE PENNSYLVANIA BAR TRUST
AND
THE PENNSYLVANIA BAR INSURANCE FUND

The Pennsylvania Bar Trust was established in 1949 to secure a life insurance and accidental death and dismemberment insurance plan for the members of the Association and their employers. In 1968, it was divided into the Pennsylvania Bar Trust Fund and the Pennsylvania Bar Insurance Fund. Both funds are managed by trustees who are appointed annually by the PBA president and approved by the Board of Governors.

The Trust Fund provides money to promote educational and charitable purposes associated with the legal profession and the administration of justice. Through the years, many county bar associations have received grants from the Trust. County bar associations may apply for a one-time grant by submitting a written, detailed request with supporting documentation to the Pennsylvania Bar Trust.

The Insurance Fund was established to provide and monitor the insurance plans offered to all members of the Association and their employees. Because of the size of the program and the complexities of the coverage’s, PBA’s Professional Liability Committee was created to advise the Insurance Fund on professional liability insurance. USI Colburn Insurance Service administers the insurance plans offered to the PBA membership.

AWARDS OF INTEREST TO COUNTY BAR ASSOCIATIONS

Louis J. Goffman - Recognizes outstanding pro bono efforts in Pennsylvania. The award is given to a person, persons or organization; it is not limited to PBA members. County bar presidents, statewide pro bono coordinators and the PBA membership can make their nominations to the Goffman Committee prior to the PBF Annual Meeting.

Pro Bono Service Awards - These annual awards recognize outstanding pro bono activities in the Commonwealth. Entries are solicited from each of PBA’s twelve zones, and winners are selected from each zone by the PBA Zone Governor.
**Gilbert Nurick Award** - Given by the Conference of County Bar Leaders in recognition of contributions and leadership in bar activities. May be awarded to any member of the PBA whose dedication and service to leadership and promotion of the organized bar and its activities has resulted in the enhancement of leadership for incoming bar association officers.

**County Bar Recognition** - Given by the Conference of County Bar Leaders since 1984, this award recognizes outstanding projects and activities conducted by county bar associations in the areas of improvement of the legal profession; the justice system; and the community. This award is presented to county bar associations during the Conference of County Bar Leaders seminar. Entry forms are mailed to county bar associations in September, with a February return deadline.

**Fifty-Year Awards** - These annual awards are given to those PBA members who have attained fifty years of membership in the Association. The awards are given at the PBA Annual Meeting.

**Arthur J. Birdsall Award** - The award is given periodically “to recognize a bar executive who has been a faithful steward of bar traditions, who is committed to the success of his or her bar association, who has enhanced significantly the stature of his or her bar association, who cooperates with other bar executives and bar leaders to make the Conference of County Bar Leaders the best it can be, and who puts his or her self second to the needs of the bar association whenever and whatever they may be.” The award usually is presented during the Annual Seminar of the Conference of County Bar Leaders.

**PBA BENEFITS AND SERVICES - BY AREA**

The **Administration area** is responsible for the overall operation of the Association. It maintains close contact with PBA leadership and helps implement policy developed by the Board of Governors and the House of Delegates. It also serves the PBA membership in the following areas:

- Pennsylvania Bar Trust
- Pennsylvania Bar Insurance Fund Pennsylvania Bar Foundation
- Finance
- House of Delegates IOLTA funds for county bar associations
- Management Information Systems
- Meetings coordination

The **Committees/Sections area** provides administrative support to the PBA’s committees and sections, as well as the Lawyer Dispute Resolution Program. It also oversees all legislative activity. The Minority Attorney and Women in the Profession conferences are coordinated through this area as are the various section retreats. The Young Lawyers Division business functions and special projects are administered under its umbrella as well.
The Communications area is responsible for communicating the Association’s policies and positions to the news media and public and for producing the Association’s publications. It accomplishes this through the creation of news releases, public education campaigns and the marketing of PBA conferences. It produces The Pennsylvania Lawyer, The Pennsylvania Bar News, The Pennsylvania Bar Association Quarterly, The Pennsylvania Bar Association Lawyers Directory and Product Guide, the PBA E-News, The County Line, At Issue and numerous section newsletters. It also handles advertising in these publications as well as subscriptions. The PBA Lawyers Directory and Product Guide is available to PBA members for purchase at a discounted rate.

The County Bar Services area is the PBA liaison with local bar associations throughout the Commonwealth. It provides the following services to PBA members:

- County Bar Malpractice Avoidance seminars
- Malpractice Avoidance for Plaintiffs
- In-firm Avoiding Legal Malpractice Programs for firms with 10-50 attorneys
- County Line Newsletter
- Stepping Out Booklets for county bar associations
- Visitation between PBA officers and county bar officers
- Annual Seminar of the Conference of County Bar Leaders

The Finance area oversees all Association finances, including payroll, investments and production of the budget. It also handles the dues for individual members and Unit County bar associations.

Management Information Systems area maintains the PBA membership file and oversees the operation of the PBA’s computer system. It also oversees the rental of the PBA mailing list.

The Meetings area advises on meeting site selection and program logistics. It coordinates all major meeting activities and serves as the principal liaison with hotels, travel agencies and other suppliers.

The Member Services Center handles all inquiries from PBA members. It responds to requests relating to PBA benefits and services, membership applications, the general Lawyer Referral Service and those pertaining to exceptional children and clients with disabilities; committee and section information, general meeting questions and the purchasing of PBA publications. It also is responsible for designing and carrying out membership recruitment and retention programs. Available services or benefits are:

- InCite Computerized Research
- Law Practice Management
- ABA Law Practice Management Publications Discounts
- Ethics Opinions
- The Phillips Group Office Products
- Magazine Subscription Program
- Overnight Mail Service Discounts
- Professional Services Program
- Rental Car Discounts
- Slip Opinions
- Credit Card Program
- Gateway Computer Discounts
- On-Line Career Center
Chapter 16
PENNSYLVANIA BAR FOUNDATION
By
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The Pennsylvania Bar Foundation

Representing The Commitment Of Pennsylvania Lawyers

To Promote Youth Justice Education

And

To Ensure Equal Access

To the Law For Pennsylvania’s Most Vulnerable
The Pennsylvania Bar Foundation

The Pennsylvania Bar Foundation, the 501(c)(3) charitable affiliate of the Pennsylvania Bar Association, was incorporated in 1984 in response to the organized bar’s desire to become more involved in public service.

The Foundation improves the public’s understanding of the law and its appreciation of democracy and strives to ensure that citizens, particularly Pennsylvania’s most vulnerable, have full access to our legal system. We accomplish our mission by making grants, seeking financial support from individuals and organizations both within and outside of the legal community, and encouraging bar members to donate their time, talent and expertise in service to the public.

The Strengths of the Pennsylvania Bar Foundation

Youth Justice Education

In this post-911 world, law-related institutions have an obligation and the unique knowledge base to make youth justice education a priority. The Pennsylvania Bar Foundation has been doing it since 1998, providing nearly $400,000 to fund youth justice education programs designed to enhance young Americans’ understanding of the law and the values and privileges of democracy. Foundation funded projects reach into school systems from elementary grades through senior high school as well as into Pennsylvania’s communities.

I Signed the Constitution

Designed to teach students about the U. S. Constitution, the award-winning “I Signed the Constitution” program brings together K-12 students, lawyers and judges for mock Constitution signing programs across Pennsylvania. The annual program kicks-off in September during the national Constitution Week celebration and continues throughout the fall. All participating schools and county bar associations receive Constitution-related materials for the signing programs. Since 1999, over 50,000 Pennsylvania students have signed the Constitution.

Law Day

Through the Law Day program, Pennsylvania lawyers and judges visit K-12 classrooms throughout the month of May to teach students about the law. Supporting materials, such as law-related lesson plans and souvenirs with lots of kid appeal are distributed to lawyers, judges and schools across the commonwealth making the day not only instructive but also memorable and fun! Since 2000, more than 2,100 schools and 1,900 lawyers and judges have taken part in the program.

Project PEACE

Project PEACE (Peaceful Endings through Attorneys, Children and Educators) works to reduce conflict and violence in elementary schools by teaching students how to mediate disagreements peacefully. Through a partnership with the Office of Attorney General, the program introduces educators, parents and schools to alternative dispute resolution skills and helps them to develop mediation programs for their own schools. Since 2000, 47 elementary schools have taken part in the training.

Mock Trial

Conducted under the auspices of the Pennsylvania Bar Association Young Lawyers Divisions, the annual mock trial competition gives high school student teams the opportunity to act as lawyers and witnesses in simulated civil trials before actual judges and panels of juries. Lawyers volunteer to assist students as team advisors, scorekeepers and regional coordinators. The winning team goes on to represent Pennsylvania in the national competition. Each year, more than 250 high schools participate in the statewide competition and in 2002, Pennsylvania’s own Quigley Catholic went on to finish second in the nationals!

Stepping Out

The Stepping Out program is designed to help graduating seniors make the often intimidating first step into adulthood by providing them with valuable information on such legal matters as renting an apartment, buying a car, driving under the influence, marriage and divorce. Lawyers visit schools to discuss these issues and to provide students with supporting materials. Under Foundation sponsorship, over 60,000 “Stepping Out” booklets have been distributed.
Freedom’s Answer
Heralded by *The Wall Street Journal* and *Parade Magazine* and supported by the National Chairmen of the Republican and Democratic Parties, the American Bar Association, and a host of other educational, political and social institutions, Freedom’s Answer is a new learning program in civics and community service developed in response to the terrorist attacks on America. Its initial goal was to generate the largest voter turnout in American history in the first election following the September 11 tragedy as a way of sending an unmistakable message to the world that freedom is alive and well in the United States. Its continuing goal will be to actively involve youth in the political process. The Pennsylvania Bar Foundation serves as the state coordinating authority and in its first year, succeeded in involving over 80 schools.

**The Strengths of the Pennsylvania Bar Foundation**

**Access to Justice**

The Pennsylvania Bar Foundation has had access to justice as a core principle since its inception. Prior to the implementation of mandatory IOLTA and its administration by the Supreme Court, the Foundation filled a crucial role through the administration of the IOLTA Local Grants Option Program. From 1991 to 1996, the Foundation received and distributed over $2 million dollars to legal services entities for counties lacking qualified bar Foundations. Today we continue to offer support to legal services entities across the state and to promote pro bono service among members of the bar.

**YLD/PBF Pro Bono Grants Project**
The Foundation, in conjunction with the Pennsylvania Bar Association’s Young Lawyers Division, conducts an annual grants program that makes available over 200 hours of LexisNexis legal research time to legal service entities throughout Pennsylvania. The program has awarded over 1200 hours of research time and over $40,000 in cash grants since its inception, although the monetary awards were discontinued after 2000.

**Annual Pro Bono Conference**
The Foundation provides underwriting support for an annual pro bono conference and other types of educational and networking forums devoted to raising attorney awareness of and participation in pro bono programs throughout Pennsylvania.

**Louis J. Goffman Awards**
Since 1989, the Foundation has recognized and rewarded outstanding pro bono programs and providers with the annual presentation of the Louis J. Goffman awards. Expanded in 2000 to honor both an individual and an organization, the program promotes pro bono service through public recognition and the presentation of a monetary prize.

**The Pennsylvania Bar Foundation Funding and Infrastructure**

The financial support of the Foundation is generated almost exclusively from voluntary lawyer contributions. There are six categories of membership:

**Keystone Society**

Like a keystone, that central, wedge-shaped stone that holds all the other stones of a structure in place, our Keystone Society members are our pivotal contributors, providing critical unrestricted support.

Keystone Society members pledge a minimum of **$10,000** to the Pennsylvania Bar Foundation. The contribution is payable over 10 years, in ten $1,000 annual installments.

Any existing Pennsylvania Bar Foundation Life Fellows interested in increasing their level of support will be credited $1,000 in the tenth year of giving.
Commonwealth Club

Commonwealth, derived from Old English, means the "common weal" or well being of the public. Our Commonwealth Club members are dedicated to ensuring the public’s well-being by supporting educational efforts that teach Pennsylvania’s youth about their legal rights and responsibilities and the privileges of democracy.

Commonwealth Club members pledge a minimum of **$5,000** to the Pennsylvania Bar Foundation. The contribution is payable over 10 years, in ten $500 annual installments.

Any existing Pennsylvania Bar Foundation Life Fellow interested in increasing their level of support will be credited $500 in the tenth year of giving.

*Life Fellow*

Each year, the Pennsylvania Bar Foundation Board of Directors nominates members of the Bar to become Life Fellows of the Foundation. Those nominated are distinguished individuals who have demonstrated their commitment to the profession through their Bar leadership activities and proactive support of the of the legal community.

A Pennsylvania Bar Foundation Life Fellow pledges **$1,000** to the organization. The pledge may be paid in a lump sum or in four consecutive annual installments of $250.

A special discounted Young Lawyers Life Fellow membership is available for PBA Young Lawyers Division members. A Pennsylvania Bar Foundation Young Lawyer Life Fellow pledges $500 to the organization. As with the senior membership, this amount may be paid in a lump sum or in four annual installments of $125.

*Fellow*

Any member of the Pennsylvania Bar Association, in good standing, who contributes **$250** to the Foundation in any calendar year is entitled to membership during that calendar year. Fellow membership is limited to 2% of the lawyers admitted to practice in Pennsylvania proportionately distributed among the Pennsylvania Bar Association zones by numerical lawyer population.

*Member*

Any person admitted to the practice of law in the Commonwealth of Pennsylvania who contributes to the Foundation an amount equal to his or her applicable Pennsylvania Bar Association dues in any calendar year is entitled to membership during that calendar year.

*Contributor*

Any other person who contributes any amount to the Pennsylvania Bar Foundation is designated as Contributor thereof. Such a Contributor shall not be entitled to vote as a member of the Foundation.

A Board of Directors consisting of 12 elected Directors, one Emeritus positions, and 16 Designated Directors manages the Foundation. The Elected Directors represent a geographical cross-section similar to the zone representation of the Pennsylvania Bar Association Board of Governors. The Designated Directors include all living Past Presidents of the Foundation, one lawyer and one non-lawyer appointed by the PBA Vice-president, one lawyer appointed by the PBI president, the Chair of the Pennsylvania Bar Association Young Lawyers Division or his/her designee, the President of the PBA, one Dean of a Pennsylvania law school and the officers of the Foundation. The emeritus position was created to recognize the longtime service and devotion to the Foundation by its former Secretary Thomas Glassmoyer. All terms are three years in length except for those Designated Directors who serve by virtue of holding a one-term office. Only Fellows, Life Fellows and Charter Members are eligible to be elected as officers of the Foundation.
**Foundation Board of Directors**

Steven E. Riley, President  
Karen Balaban, Vice President  
Louis N. Teti, Vice President  
Richard Bell, Secretary  
Ralph S. Snyder, Treasurer  
Arthur L. Piccone, President, Immediate Past President  
Secretary Emeritus – Thomas Glassmoyer

**Zone Directors**

Hon. Todd B. Seelig., Zone 1 Director  
Chester C. Corse, Jr., Esq., Zone 2 Director  
Howell Mette, Esq., Zone 3 Director  
Terry W. Light, J.D., Zone 4 Director  
Zygmunt R. Bialkowski, Jr., Esq. Zone 5 Director  
Robert L Ceisler, Esq., Zone 6 Director  
Christine Hall McClure, Esq. Zone 7 Director  
Thomas W. Cartwright, Esq., Zone 8 Director  
Mason Avrigian, Esq. Zone 9 Director  
Jack J. Steiner, Esq., Zone 10 Director  
Hon. Thomas King Kistler, Zone 11 Director  
Robert Raphael, Esq. Zone 12 Director

**Designated Directors**

John J. Bagnato, Esq.  
Jerome E. Bogutz, Esq.  
Timothy J. Carson, Esq.  
William H. Eastburn III  
Charles Eppolito III, Esq.  
Susan Mondik Key, Esq.  
Joseph H. Jones, Sr., Esq.  
Marvin S. Lieber, Esq.  
Albert P. Massey, Jr., Esq.  
Mrs. Audray R. Muscatello  
Non-lawyer vacancy  
Lawyer vacancy  
Dean vacancy
Chapter 17
PRO BONO PROGRAMS
by
Barbara I. Kittrell
Executive Director
Berks County Bar Association
544 Court Street
Reading, PA 19603
610-375-4591
E-mail: kittrell@berksbar.org
Pro Bono Program

Advance Preparation - Select a committee to handle the program (Lawyer Referral/Legal Aid) or a special committee. It is very helpful to have a judge on the committee or a judge to be a co-signer on the letter sent to members of the Association.

PLAN

All active members of the Bar Association are expected to serve Pro Bono clients unless personal contracts or other valid reasons prohibit the service. In addition, usually Associate, Honorary or members over 70 years of age, are not required to serve. When the program is finalized a letter signed by the President of the Bar Association and, if possible the President Judge, should be sent to members.

Each member would staff the facilities of legal services for a half day period, approximately once every 18 months. (This time will vary with the size of the individual associations.) The scheduled staffing would be in the morning or afternoon one or two days a week. Again, this will depend on the size of the Association and the needs of each County.

During the staffing period, the attorney would see approximately 4 or 5 people who are scheduled by legal services. Many will need only advice. One or two may need further assistance. An attorney would not be responsible for handling more than two matters needing further assistance.

Cooperation by the legal services staff is very important. Attorneys or paralegals should be available to give aid to the sitting attorney when necessary.

The Bar Association would schedule the assignments and publish in the legal journal at least once every 6 months. Legal services should be responsible for reminding attorneys of their specified appointment times, either by phone or mail. Any attorney who cannot serve his/her specified time would be responsible for trading time periods with another attorney.

For attorneys not wishing to serve at the legal services offices, a sum would be contributed annually, the amount to be decided by the Pro Bono Committee. These funds would be distributed at the discretion of the Bar Association to legal services to obtain staff personnel, (attorneys or paralegals) or equipment, etc. needed by the legal services offices. Twice a year the legal service office would provide the Bar Association a report on the use of these monies.
Sections & Divisions

SECTIONS

A Section is formed within a Bar Association to address the needs and education for a particular segment of the Bar, such as Environmental Law, Family Law, etc. These section members pay section dues to the Bar Association. All members must be members of the Bar Association. Meetings are usually scheduled through the Bar Association office and held on the Bar Association premises. A successful section should hold meetings once a month on a designated day, such as the first Thursday of the month, etc. Section meetings may be held as breakfast meetings, late afternoon sessions or during the lunch hour.

DIVISIONS

A division, such as the Young Lawyer Division, is formed for the betterment of the profession and for the advancement of the aims and work of the Association. All members of the Division must be members of the Bar Association. The Division collects its own dues and has an executive committee with officers as directed by the bylaws of the Division. The Division fiscal year should correspond with the Associations. An annual or semi-annual report must be made to the Board of Directors or governing body of the Association. A Division should provide educational and service programs encouraging the professional development of its members.
PUBLIC RELATIONS FOR COUNTY BAR ASSOCIATIONS

The key to success with any public relations campaign is communication. The more you communicate with the public about your county bar association and the benefits it provides, the more success and longevity your association will have in the coming years.

So, how do you go about getting a public relations campaign started? It’s simple. First, decide what you want the public to know about your county bar association. For example, your bar association has a strong lawyer referral program and is active in community service and educating the public about the legal profession. Now you need to determine how best to communicate that information to the public. The fail-safe answer – utilizing the media.

Here are some easy ways you can utilize the media to get information about your bar association to the public:

1. **GET TO KNOW YOUR LOCAL MEDIA**
   As an executive director or bar president, it is important for you to build a relationship with your local editors and reporters. To start, compile a list of all local media, including daily and weekly newspapers and radio and television stations. Next, set up a meeting with a paper’s editorial staff or ask the newspaper or television reporter who covers legal news to stop by the bar association and see how things operate. The media needs to know that when it comes to providing legal information in your area, your bar association is the first resource. Once that relationship is established, you will find it much easier to get your “newel covered.

2. **NEWS RELEASES AND MEDIA ADVISORIES**
   News releases are a great way to get information about your association to the public - just make sure that what you’re releasing is something the public wants to know. The best way to make that determination is to take a significance test: Is this information of real interest to the general public? Is it unique to our community or a first of its kind? Does it involve or affect local residents? If you answer yes to one or more of these questions, then start writing.

   News releases should be brief. As a general rule, keep the length to no more than two pages double spaced. Give the most pertinent information in the beginning with the less important information at the end – follow a pyramid style. Make sure to include the basics: who, what, when, where and why. Always list a contact person and phone number (this should be someone you are confident can speak for the association and is readily accessible.) A news release can be used by itself.
as a means to announce a new program or as a follow-up to an event. Either way, make some calls to the media to ensure that they receive the release.

Media advisories are used to announce an event or press conference. They should tell the media what, who, when and where (give an actual address.) The trick with an advisory is to only wet the media’s appetite. Give them enough information to make them want to cover the event, but not so much that they don’t have to attend.

3. LETTER TO THE EDITOR
Most newspapers have a page dedicated to reader responses and guest editorials. Take advantage of this – tell the public about your bar association’s viewpoint on some issues. For example, if the legislature is debating a funding decrease for legal services, describe how legal services helps low income families in your community and encourage your local legislators to protect everyone’s access to the justice system. To make your op-ed appealing to editors, keep it between 800-1,200 words and double spaced.

4. TV AND RADIO INTERVIEWS
Take full advantage of the TV news and talk radio shows. Through these outlets, lawyers can provide a service to the public by addressing issues that are of interest and benefit to viewers and listeners. But don’t wait for stations to call you – if you think of a timely interesting topic, call the producer of a show and suggest a particular subject. When you do get that interview, here are some simple tips to remember: be prepared and know the subject; anticipate questions; speak in simple terms (avoid ‘legalese’); never lose your cool; don’t be afraid to say “I don’t know;” avoid talking off the record-, be friendly, factual and frank; and be clear on your message and make sure it comes across in your interview.

5. HANDLING MEDIA CALLS
When a reporter calls you or the bar association for a comment on a particular issue, always return the call as soon as possible -- most reporters are on strict deadlines. There is nothing worse to read or hear that “Mr./Ms. _____ was unavailable for comment.” In addition, when reporter takes you by surprise with a story, never say “no comment.” Tell the reporter that you have just learned of the situation and will call him/her back when you have gathered all of the facts. Make sure to always be a resource for reporters. Put them in touch with your members who may be experts in certain fields – your members will thank you too.

PUTTING IT INTO ACTION: PLANNING AN EVENT OR PRESS CONFERENCE

The following is an example of how and when to interact with the media for an event or press conference in five easy steps. The event highlighted is the Stepping Out Program put on by many county bar associations around the state. Please feel free to use
the included sample media advisory and news release as a template for your future programs.

Step#1 Once the date is set, the location is selected and the speakers are identified, it is time to think about what parts of the event to pitch to the media. These parts could include: area lawyers working with high school students; high school students learning about their legal rights; practical applications of the law for young adults; and the Stepping Out Program is sponsored by the ______________ County Bar Association.

Step#2 Put your concepts to work in the event’s media advisory. A sample, media advisory for the Stepping Out Program is attached (SAMPLE A). The media advisory should be faxed to all appropriate daily and weekly newspapers and television and radio stations. In major media markets like Pittsburgh and Philadelphia, the advisory should be faxed no earlier than two days prior to the event. The media in these areas receive hundreds of faxes per week – you don’t want yours to get lost in the pile. In smaller markets, the media advisory should be faxed or mailed one week prior to the event. REMEMBER – if you have developed a relationship with a reporter or editor, send that person the advisory.

Step#3 One day prior to the event, make follow-up calls to the media that should have received the advisory – ask for the newsroom, assignment editor or “your reporter” when you call. Confirm that they received the advisory and offer to fax it again if they didn’t receive it. In addition, take a minute or two to tell them how great the event will be with lawyers helping students learn about their future in a fun manner.

Step#4 Prepare the news release. A sample news release for the Stepping Out Program is attached (SAMPLE B). The release should be distributed to media who attend the event and mailed to all other media that received the media advisory. You also may want to fax the news release to your daily newspaper and a few radio stations.

Step#5 The actual event – be available to the media. If possible, greet the media at the door, guide them to the event location and give them a press release (always try to hand out the release prior to the event – it’s much easier to ask and answer questions when the media knows what is taking place). In addition, try to facilitate interviews with students and lawyers. At the end of the event (after you’ve followed up with any necessary media calls), give yourself a well-deserved pat on the back – you are done!

If you should have questions regarding these helpful hints or need some assistance in formulating your own public relations campaign, please feel free to call Marcy Mallory (x2247) or Jennifer Branstetter (x2216) with the PBA Communications Department at (800) 932-0311. Best of luck!
MEDIA ADVISORY

DATE:

TO: Editors & News Directors

FROM: Contact Name
      Daytime Phone Number

SUBJ: LAWYERS HELP HIGH SCHOOL SENIORS TO STEP OUT

______________ county lawyers will help (High School) high school seniors, “step out” of high school and into the future during the interactive Stepping Out Program on (Date) at (Time) at the (High School Name), (High School Address), (City).

Sponsored by the ______________ County Bar Association, the Stepping Out Program is designed to help graduating seniors make the often intimidating first step into adulthood by providing them with valuable information on such legal matters as renting an apartment, buying a car, driving under the influence and marriage and divorce.
NEWS RELEASE

FOR IMMEDIATE RELEASE

COUNTY LAWYERS HELP HIGH SCHOOL STUDENTS TO STEP OUT

CITY (Date) – The _______________ County Bar Association today launched its Stepping Out Program for high school seniors during a visit by several of its members to the (High School).

Designed to help graduating seniors make the often intimidating first step into adulthood, the Stepping Out Program provides students with valuable information on such legal matters as renting an apartment, buying a car, driving under the influence and marriage and divorce. During the program at (High School), attorneys and talked with students about their legal rights and conducted an interactive question and answer session.

‘Knowing your legal rights and responsibilities is an essential part of making a positive and successful transition from childhood into adulthood,” noted , __________, county bar president. “The Stepping Out Program works to teach students, in an enjoyable manner, about their rights and ease some of their anxieties about life after high school.”

In preparation for today’s activities, each participating student received a 30-page Stepping Out booklet detailing various areas of the law including voting and jury service that will affect them in the coming years. Teachers were encouraged to review the booklet with their students and begin to foster an appreciation of these legal rights and responsibilities with their students.

To date, the __________ County Bar Association has hosted ___ Stepping Out Programs in high schools across the county and anticipates holding at least ___ more by the end of the school year. For more information about the Stepping Out Program, please contact the County Bar Association at (Bar Association Phone Number).

#   #   #
Chapter 19
SECTIONS AND DIVISIONS
by
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E-mail: bcb@epix.net
Sections & Divisions

SECTIONS

A Section is formed within a Bar Association to address the needs and education for a particular segment of the Bar, such as Environmental Law, Family Law, etc. These section members pay section dues to the Bar Association. All members must be members of the Bar Association. Meetings are usually scheduled through the Bar Association office and held on the Bar Association premises. A successful section should hold meetings once a month on a designated day, such as the first Thursday of the month, etc. Section meetings may be held as breakfast meetings, late afternoon sessions or during the lunch hour.

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Chapter 20
SOCIAL EVENTS
by
Nancy R. Paul
Executive Director
Montgomery Bar Association
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E-mail: nancypaul@montgomerybar.org
SOCIAL EVENTS

Social events are an excellent way for your members to network and mingle with other attorneys and judges. The social atmosphere provides a neutral meeting ground for everyone to enjoy some much-needed camaraderie in today’s hectic world.

Planning and pricing the event is key to your success. Make sure you give enough advance notice for people to place the event on their calendars and avoid conflicts. If possible, publish the dates for the entire year each January or at the start of a President’s term. You may want to consider fax and email reminders prior to an event to boost attendance and decrease no-shows.

As a part of an association’s budget, estimate a dollar figure to be allocated to programs and events. Try to price each event so that the majority of your costs are covered by the total income collected and the excess costs will be covered in your budget. Encourage participation from the younger members of the Bar by providing discounted rates.

Require individuals to sign up and remit payment in advance of the event. Establish a reasonable cancellation policy, usually three days prior to an event. If you are planning a banquet function, the food provider will usually require at least 48 hours notice for a guarantee on the number of guests to be served in your party. Pay particular attention to the guarantee as experience has indicated 5-10% of the registered guests will not show for the event. If you guarantee the full count you will be responsible to pay for all even though only 90% of the group attended and had the meal. Request in the food and beverage contract that the caterer will be prepared to serve up to a 5% increase over the final guarantee. This provides you with a bit of a cushion when determining your final count.

If you establish a theme in conjunction with the event, e.g. honoring a retiring or new judge, a 50-year member, a new or Past President, etc. – it usually encourages participation from your membership for the function.

When possible, try to offer a broad mix of social events including events for members only, members with significant others and members with families. Try casual events as well as more formal events. The more variety of events you offer, the greater their chances are of appealing to the members. If you find attendance is declining annually for a particular function, perhaps it is time to discontinue this event and try something new. Experience is the best indicator as to the types of events your membership appreciate and are willing to support.

Listed below are the social events held at the Montgomery Bar Association on an annual basis. For more specific information, please feel free to contact Nancy R. Paul, Executive Director at (610) 279-9660, Ext. 202.
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Category</th>
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<tbody>
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<td>Annual Ski Trip</td>
<td>February</td>
<td>Mem/Family</td>
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<tr>
<td>Bar Leaders Dinner</td>
<td>February</td>
<td>Mem/Guest</td>
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<td>Spring Dinner Dance</td>
<td>April</td>
<td>Mem/Guest</td>
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<td>Clambake/picnic</td>
<td>June</td>
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<td>YLS * - Phillies outing</td>
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<tr>
<td>Bench Bar Conference</td>
<td>September</td>
<td>Mem/Family</td>
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<tr>
<td>Medical/Legal Committee Dinner</td>
<td>October</td>
<td>Mem/Guest</td>
</tr>
<tr>
<td>Annual Bar Foundation Fund Raiser</td>
<td>October</td>
<td>Mem/Guest</td>
</tr>
<tr>
<td>Annual Black Tie Membership Dinner</td>
<td>November</td>
<td>Member</td>
</tr>
<tr>
<td>Thanks-For-Giving 5-K Run</td>
<td>November</td>
<td>Mem/General Public</td>
</tr>
<tr>
<td>Holiday Party sponsored by YLS*</td>
<td>December</td>
<td>Member and Courthouse Personnel</td>
</tr>
</tbody>
</table>

* Young Lawyers Section
Chapter 21
RESOURCE LISTING
RESOURCE LISTING

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