

Florida Voluntary Bar Association Leaders

President's Checklist

TWO+ YEARS PRIOR TO INSTALLATION:

- Attend The Florida Bar's Voluntary Bar Leaders Conference in July
- Familiarize yourself with all aspects of your voluntary bar
 - Attend every type of event
 - Chair or participate in several committees
 - Examine the budget
- Work on relationships with local legal service providers, judges, court administrators,
 - other bars in the area (state bar/local bars/special purpose bars), bar foundation, law schools,
 - corporate partners and sponsors, and your fellow bar leaders
- Have conversations with:
 - Past and upcoming leaders re: priorities for the Bar
 - Executive Director re: priorities for the Bar, mutual expectations, how we want to work together
 - Your Family re: time commitment and their involvement with the Bar as a spouse/child
 - Your colleagues and Staff re: time commitment, their involvement in the Bar

ONE YEAR PRIOR TO INSTALLATION: (During Term as President-Elect/Vice President)

- Plan event calendar for Presidential year, include:
 - Regularly scheduled Board of Directors meetings
 - Orientation session for new Board of Directors/"Fun Night"/Socials
 - Planning sessions for Board of Directors
 - Bar events for members
 - Judicial Investitures/Retirements
 - Speakers
- Attend The Florida Bar's Voluntary Bar Leaders Conference in July
- Draft one or two President's Messages
- Think of "theme" for your year as President
- List two or three reasonable objectives that you will accomplish during your Presidential year
- Key Documents and Information to Review and Have Readily Accessibility for Your Use
 - Bylaws and articles of incorporation.*¹
 - Mission, strategic plan and/or annual plan
 - Board and Executive Committee Policies
 - Fiscal policies
 - Financial reports
 - Staff organization chart
 - Officer's job descriptions

- Executive Director’s job description (and contract, if applicable)
- Officers/Board of Directors Reimbursement Policy
- Bank signature cards
- Current membership application
- Description of member services
- Bar calendar, Court/Judge/State of Florida calendar for courthouse holidays
- Bar program descriptions or recent activity report
- Directory of your Bar Association members/current membership list
- Current list of committees and their chairs

ONE TO TWO MONTHS BEFORE INSTALLATION AS PRESIDENT:

- Write first draft of official “first” President’s Message
- Make committee appointments
- Talk with out-going president and executive director re: any wrap-up needed on outstanding projects or issues
- Make sure you have letterhead, stationary, and logo of the Association (if you do not have this, purchase it)
- Obtain keys to bar office and passwords to accounts, office burglar alarm, e-mail distribution lists, computers, etc. (your association should have a manual with this key info in it)

AT INSTALLATION AS PRESIDENT:

- Distribute to members master calendar of all events in your upcoming Presidential year
- Recognize with thank you gift/card the out-going President

AFTER INSTALLATION AS PRESIDENT:

ONGOING EVERY MONTH:

- Write President’s Message and make newsletter deadline
- Prepare agenda for Board meetings and membership meetings
- Attend all association events and (if possible) many specialty bar meetings in the area
- Preside over Board meetings, membership meetings
- Respond to correspondence to President
- At all meetings, publicly recognize judges, constitutional officers, and Board members in attendance
- “Pop in” at committee meetings to say “hello” and lend any support committee needs
- Talk/e-mail committee chairs for status updates and any support committee needs

DURING FIRST MONTH AS PRESIDENT:

- Host a social event/get together for new Board and committee chairs

- Obtain cell phone numbers/contact information for your Board/executive director and load on your cell phone
- Personally call each new Board member to welcome them to the new Bar year and the Board and to thank each for service

SIX MONTHS INTO PRESIDENCY:

- Meet with Executive Director to conduct the Executive Director's performance review

TWO MONTHS PRIOR TO PRESIDENCY ENDING:

- Plan gift/thank you to be presented to incoming President from you
- Plan recognition with thank you all committee chairs and Board members for service
- Provide to in-coming President (preferably in an in-person meeting) pending projects, insight and tips as to past efforts and what will need continued emphasis and focus

* This list is a basic list to aid voluntary bars around the state. Be sure to read your organization's bylaws as there may be additional duties specific to your position in your organization that are not outlined above.