

SPRING 2011

Board Actions Taken to Right the Ship – and Solutions to Supporting the Pro Bono Legal Clinic

An alert about Bar Association financial straits and an explanation of how a bar members dues were used to provide services to members was described in the last Bar Association newsletter. Since that time, the bar association board has made substantial changes to the budget in an attempt to right the ship.

Those actions include: re-establishing the cash bar at bar association dinners; lowering insurance costs; reducing executive director hours; and reducing event costs. The Association is also exploring new and innovative ways to generate revenues without raising bar dues to strengthen the bar association in the future. Those ideas include soliciting law firms to participate in fundraising challenges, table and other sponsorship opportunities at bar association events including CLE programs; increased advertising for our newsletter, as well as parties that present specific bar sponsored or endorsed fundraising opportunities.

Had no action been taken, the Association's money market account, which at one time had had a balance as high as \$65,000, would have been fully exhausted in eighteen months. Budgetary cuts have extended that eventual-ity to three years out. The current money market balance is \$24,880.83. Currently, we are carrying an expenses over income shortfall of approximately \$5,000/year.

In the course of attempting to right the ship, concern about the impact on the Third Level Pro Bono Legal Clinic

rightly rose to a pitch from bar members. Support for the need to assist pro bono litigants was not in dispute. However, the historical inclusion of \$5,000 paid from the bar association's operating budget could no longer be maintained as an ongoing part of the Association's operating expenses given the accelerated decline of interest income and available funds.

The Association salutes the call to action by bar members, led in large part by George Thompson and Barry Levine. Prior to a fundraising event held by George Thompson, bar members contributed over \$5,000 to the Pro Bono Legal Clinic, largely in response to a letter from George. The February 24th fundraising event held by Thompson & O'Neil raised another \$1,600. This focus on the need to support the pro bono legal clinic is an opportunity.

The Grand Traverse-Leelanau-Antrim Bar Association maintains an endowment with the Grand Traverse Regional Community Foundation. The intention of the endowment was to maintain, in perpetuity, a fund that would benefit local 501(c)(3) organizations, like the Pro Bono Legal Clinic, or Womens Resource Center, through interest income generated from the endowment fund.

Over the years, there has been a consistent donor to the fund. However, no endowment funds have been used by the association in the past, and in fact, at the time the

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market took a downward tumble in 2008, \$10,000 was pulled out by the foundation to preserve fund balances. That \$10,000 was recently returned to the endowment fund for a current total endowment fund balance of \$36,078.31 .

Four percent of the endowment fund balance may be disbursed each year to an eligible 501(c)(3) charity. We, as the Bar Association, should take the opportunity to build our endowment to a balance of at least \$125,000. At such a level, the Bar Association's endowment fund would have a sufficient balance to generate investment interest income for an annual disbursement of \$5,000, in perpetuity, for the benefit of the Pro Bono Legal Clinic.

Additional fund raising efforts only further enhance what can be done with those funds. To learn more about the Endowment Fund, please go to www.gtlaba.org. If you are interested in chairing or serving on a fundraising committee to raise funds for the endowment, please email me at sak@wilsonkester.com

MRPC 6.1 provides that a lawyer should render public interest legal service. A lawyer may discharge this responsibility by providing professional services at no fee or a reduced fee to persons of limited means, or to public service or charitable groups or organizations. A lawyer may also discharge this responsibility by service in activities for improving the law, the legal system, or the legal profession, and by financial support for organizations that provide legal services to persons of limited means.

We each fulfill this responsibility in a myriad of ways. The Bar Association is committed to this pledge. The Board is committed to doing so and preserving the financial integrity of its members Association.

Shelley A. Kester

2010-2011 GTLABA President



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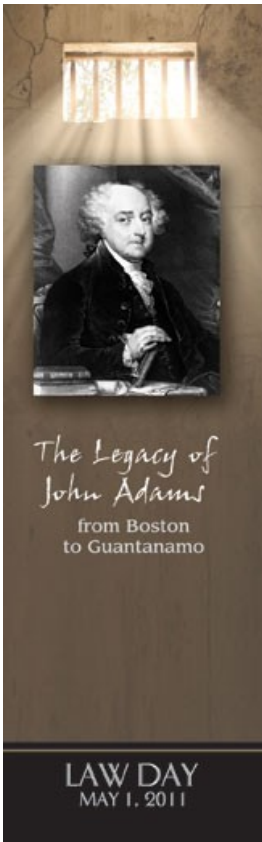
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Law Day 2011—The Legacy of John Adams from Boston to Guantanamo



The GTLA Bar Association will be celebrating Law Day on Friday, April 29th. In a departure from previous years, the bar association's luncheon will be held in the Grand Traverse Governmental Center in the lower level cafeteria. Dean Robb will be our keynote speaker, and the event is open to the public.

In addition, the bar association will be holding an all-day legal clinic in the McGuire Room of the Traverse Area District Library's Woodmere Branch. Attorneys who are interested in volunteering for a two hour (or longer) shift, should contact April Sala in the Law Library at 922-4715 or via email at admin@gtlaba.org.

Annual Meeting and Dinner

The Annual Meeting and Dinner is scheduled for Thursday, May 3rd at the Traverse City Golf and Country Club beginning at 5:30 pm.

The annual meeting will include a review of the bar association's current finances and information regarding the Endowment Fund. Elections will also be held for open Board of Governors' seats.

Please watch your email for registration and ballot information.

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Message from the State Bar of Michigan

On March 31st, the State Bar asked its members through an e-mail and electronic survey link to "tell us what you really think." We are serious about soliciting candid feedback on what members think about State Bar programs and services, what members need and overall how we can serve members better.

Please take the 15 minutes to complete the survey. No individual members will be identified, and information will not be shared with any vendors for marketing or other purposes. To make this initiative a little more fun, completing the survey offers the opportunity to enter a drawing for prizes—including two of the latest version iPads, and five \$100 American Express gift cards. Survey responses by the end of next week (April 19) are much appreciated.

To access the survey, please go to <http://www.zoomerang.com/Survey/WEB22C5MPHBNQ9/>

Thanks for your help in our efforts to make State Bar membership a more valuable resource for Michigan lawyers.

Bar Association Newsletter

Editors & Committee Co-Chairs: Aaron Bowron and Corey Wiggins. Published Quarterly. Kindly mail articles and information to GTLABA by **June 20, 2011**, for publication in the summer issue. Questions or comments should be directed to Aaron Bowron at legaloil@aol.com or Corey Wiggins at coreyjwiggins@gmail.com.

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Marketing – Develop a Marketing Opportunity Checklist

Ursula Rozanski



In my last article I wrote about developing and managing the firm's 12-month marketing plan. This article will focus on developing a marketing opportunity checklist for the firm's 12-month marketing plan. Each of the marketing opportunity checklist items noted here should be adapted to your firm's style, brand and productivity level, using the management tool of your choice.

Also consider that the time invested by the firm on marketing opportunities, typically will be competing for billable time. It is important to prioritize the marketing opportunities so that the highest-return (new revenue sources, new clients, etc.) opportunities for the time invested by the firm will have the highest priority and the highest return.

The idea is to develop a marketing opportunity checklist where the activities: (1) tangibly promote the firm's reputation, capabilities, and commitment to clients, (2) can be quantified in terms of the investment of time, money and ROI, and (3) are productive, focused on tangible results and cost effective.

Some thought starters for a marketing opportunity checklist include:

- Develop an original composition article and send it to your target audience prospects, relevant clients, publish it on your website, send it to an industry relevant

periodical, a local newspaper or a reputable organization that will accept and publish it. Also consider a newsletter format which can be very effective.

- Promote significant firm achievements or events with a press release, publish the press release on your website as well.
- Participate in selected civic organizational events or meetings.
- Participate on a local municipal board or commission.
- Develop opportunities for speaking engagements, participating in topical panels or as a member of a lecture circuit.
- Volunteer to design and develop (write) materials (disclaimers, agreements, best practices, etc.) for an entity that is somehow related to the firm's client base profile, and verify that the materials will be published (perhaps on a best practices basis) and provide author credits.
- Organize and provide leadership for an association that benefits the local area.
- Mail a marketing piece to members of the organizations to which you belong.
- Send letters to attendees after you attend a conference, that would be able to facilitate introductions to new clients.
- Request "media kits" from possible "media buy" resources to estimate the cost of a potential media buy.
- Hold an open house or client appreciation day at the

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firm's office. Invite local public officials to meet and greet the firm's client base.


- Offer pro bono services to community based or specialized support organizations. Note this participation (and the results) on the firm's website and potentially in a press release (with photos).
- Volunteer for a career day at a local school.
- Develop opportunities for non-conflicting board memberships.
- Become a fund-raiser for a local and reputable non-profit or community organization.
- Become a membership-chair for an organization to which you belong, allowing you the opportunity to meet new executive members.
- Ask clients if they would be willing to provide your firm a testimonial or a reference (waivered of course) that you could include in your marketing collateral and your website.
- Participate in organizations (as a member, as a guest speaker) whose members typify the firm's target audience profile.

Some considerations to take into account once you've developed your marketing opportunities checklist:

- Position your marketing opportunities into your 12-month marketing plan along with any related costs (including how much billable time is being invested), timing (when to start, duration and when to complete), and assigned ownership (who will develop, track and manage the marketing opportunity).
- Prioritize your marketing opportunities carefully as these often take the place of billable time.
- Verify that you have a well thought-out and documented target audience profile and can articulate the value proposition that you offer to them through your services, communications and marketing efforts.
- Synchronize the marketing opportunities checklist with the firm's key marketing campaigns that are scheduled in the firm's 12-month marketing plan.

In summary, developing a marketing opportunity checklist is basically another marketing tool that a firm can use to cost effectively and productively plan its marketing efforts to achieve a specific and predictable result.

Ursula Rozanski is Managing Principal/President of Rozanski & Associates, Inc., a Michigan-based management consulting / resources provision firm for solo and small to medium enterprises (www.rozanskiandassoc.com), and in particular professional services firms. The company was established in 1995 and incorporated in 2001. Ursula can be reached via email at urozanski@rozanskiandassoc.com, or by phone at 989-225-2570. Copyright 2010, 2011 Rozanski & Associates, Inc., All rights reserved.



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Heard in the Halls



Allen G. Anderson's participation in helping to launch TC Public Service Garage was featured in a late March issue of the *Traverse City Business News' Ticker*. Anderson helped long-time Midas employees, Steve and Al Robideau, secure financing and negotiate the purchase of property for the

garage that will open its doors on Diamond Drive in early April.



Calcutt Rogers & Boynton is pleased to announce that **Joshua M. Reynolds** (left) and **Gregory L. Jenkins** (center) have become partners at the

firm. Josh and Greg will enhance the firm's expansive business, employment, banking, real estate, probate, and litigation practice.

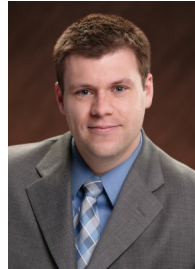
Christopher G. Rogers (right) has also joined Calcutt Rogers & Boynton as an attorney. Chris, a Traverse City native, earned his B.A. in Economics from the University of Michigan (2004) and his J.D. from the University of New Hampshire School of Law (2009). He also attended Tsinghua University School of Law in Beijing as part of a Chinese Intellectual Property Summer Institute, where he studied world trade and intellectual property law, the Chinese legal system, and technology licensing. Chris is a member of the State Bar of Michigan (2010) and the Illinois State Bar Association (2009). Chris' areas of practice include civil litigation, real estate, estate planning, condominium law, and intellectual property law.



Lee Hornberger's article "Leave Provisions of the Labor Code of the Socialist Republic of Vietnam" was published in the Winter 2011 edition of the State Bar of Michigan's *Labor and Employment Lawnotes*. In addition, his article "Back in Indochina, Things Are a Bit Different" was published in the

February 13, 2011, *Traverse City Record-Eagle*.

Michael Kronk, Melanie Stanton and Kyle Trevas have moved their offices to 310 West Front Street, Suite 408, Traverse City, MI, 49684. Kronk & Stanton, PLLC, office telephone number is (231) 922-8590 and the telephone number for Kyle Trevas is (231) 929-3611.



Andrew Blodgett, of Smith Haughey Rice & Roegge's Traverse City office has been named shareholder of the firm. Blodgett practices in the areas of insurance litigation, commercial litigation, and agriculture law. He also is co-chair of the firm's Agribusiness Industry Team. Traverse City shareholders **Peter J. Boyles and Todd W.**

Millar will serve on the firm's Board of Directors in 2011.

Michael Tarnow has successfully completed the Appraisal Institute's Professional Development Programs for the Valuation of Conservation Easements (2007) and Litigation (2010). He is included in the Appraisal Institute's Program's Registry located on the Appraisal Institute's website (www.appraisalinstitute.org). Completion of a program shows that participants have completed education and passed related course exams in the particular specialized topic. The three classes are: The Appraiser as an Expert Witness: Preparation and Testimony, Litigation Appraising: Specialized Topics and Applications and Condemnation Appraising: Principles & Applications.

A good time for a worthy cause was had courtesy of **George Thompson** at his firm's after hours fund raiser for the Third Level Crisis Center Pro Bono Legal Clinic. The supportive cast of characters included **Lee and Donna Hornberger** with Lee secretly sharing lawyer jokes; **John Moothart** extolling the virtues of smoking fine cigars; **Mike Lewis** and **Jay Hardin** contemplating hosting the next similar event at their palatial new place of employment; **Jim Saffell** wowing the crowd with video of his dizzying feet/feat of Nordic skating on Lake Leelanau; and many other luminary members of our bar too numerous to men-



tion. Approximately \$1,500 was raised.

Attorney **Jeff Wingfield**, an elder law attorney at Rizzo, Rysso & Wingfield, led many a dance partner at a tea dance presented by the Traverse City Senior Center. The dance was held in honor of Valentine's Day on February 11, 2011, at the Elk's Club.

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