

EXECUTIVE POSITION PROFILE

Executive Director



SAN DIEGO COUNTY
BAR ASSOCIATION®

This search is being conducted by:

VettedSolutions

Washington, DC • Chicago, IL • Los Angeles, CA

Telephone: +1.202.544.4749



vettedolutions.com



[@vettedolutions](https://twitter.com/vettedolutions)



[/vetted-solutions-llc](https://www.linkedin.com/company/vetted-solutions-llc)

Vetted Solutions is a proud member of:



Table of Contents

Click any entry in this Table of Contents to go directly to that page.

Click on the page number at the bottom of any page to return to the Table of Contents.

I. Position Description	3
Opportunity	
Scope of Position	
Education, Experience and Essential Skills/Abilities	
Personal Characteristics of the Executive Director	
Measures of Success	
II. Organization Review	6
About San Diego County Bar Association	
SDCBA Mission	
What the SDCBA Stands For	
Education	
Advocacy	
Diversity	
Lawyer Referral and Information Service (LRIS)	
Practice Based Sections and Project Committees	
Board of Directors	
III. About Vetted Solutions	9

I. Position Description

Opportunity

The San Diego County Bar Association (SDCBA) is looking for its next **Executive Director**. The SDCBA is the region's oldest and largest law-related organization, with a \$3.5 million budget, 21 staff members, and approaching 10,000 legal professional members. This is an exciting time for the SDCBA; the successful candidate will continue recruiting top talent into the organization and growing its value for members.

Scope of Position

The SDCBA has uniquely positioned itself for success. The organization's steady growth and quality and array of member benefits has fueled the development of future leaders in the organization and in the practice of law.

The next Executive Director will be an individual who understands and has substantial experience with association management and the legal profession. This includes successfully implementing a strategic plan, leading an organization through innovations or other evolutionary changes, and nurturing relationships with other related organizations, including specialty,

affinity and regional bars, local and state government, law school deans and administrators, the media, and members of the legal profession. With such a background, this individual will work in partnership with the SDCBA Board of Directors to lead the organization through its next phase of growth.

The Executive Director of the SDCBA reports to and is monitored by the Board of Directors. The Executive Director provides strategic leadership to the internal team; manages the operations, finances and programs of the organization; and advances the strategic plan, vision, initiatives and priorities of the Board of Directors, Board level committees, and goals of the SDCBA.



Additionally, the Executive Director will:

In Strategy and Management:

- Partner with the Board and staff to implement the strategic vision of the organization.
- Collaborate with the Board of Directors to develop, plan, and implement the SDCBA's 5-year Strategic Plan with appropriate goal-setting and annual metrics.
- Develop a dashboard, summary document or regular process to review the 5-year Strategic Plan, reporting progress to ensure that priorities and resource usage align. With the Board of Directors' agreement, course correct as needed.
- Enhance the SDCBA's already strong reputation and positioning within the profession.
- Successfully manage the staff and day-to-day operations of the SDCBA to provide for the sustainability and long-term stability of the organization. This includes recruitment and retention of a talented, diverse staff.

In Communications, Membership and Programs:

- Working with and when requested by the Board President, serve as a key internal and external spokesperson for the SDCBA to the media and public. In conjunction with the President and/or executive board member, may be asked to speak to local organizations, community groups, or government bodies on behalf of the organization.
- Proactively lead efforts to enhance organizational visibility and awareness by developing, maintaining and strengthening relations with related organization, law schools, public and private entities, and the media.
- In conjunction with staff and Board, lead marketing and public relations efforts.
- Ensure that the SDCBA continues its record of delivering quality member services and programming.



- Ensure continued successful operation of the Lawyer Referral & Information Service, including compliance with State Bar regulations.
- Ensure the SDCBA collaborates with the San Diego County Bar Foundation, the charitable arm of the SDCBA.
- Ensure that key public policy advocacy requests are handled in a prompt and informed manner.

In Governance & Risk Management:

- Ensure the Board of Directors is kept fully informed on the organization's and all the important factors that influence it.
- Ensure good communication with the Board and staff.
- Foster and encourage active Board leadership, participation, and development.
- Ensure the maintenance of official records and documents consistent with the SDCBA policies, and in compliance with federal, state, and local regulations.

In Financial Management and Performance:

- Work with staff to propose an annual organizational budget for Board of Directors' approval based on an assessment of needs, the strategic plan and external factors. Accountable for financial stability, as well as regular cash flow, finance, and forecasting reports to the Board of Directors.

- Ensure financial management operations that promote good stewardship throughout the organization.
- Manage and understand contracts.
- Manage multiple revenue streams that include membership, education, and sponsorship.
- Work with staff and the Board to manage and oversee real estate assets, investment accounts, lease agreements, and potential future joint ventures.

Education, Experience and Essential Skills/Abilities

Successful Executive Director candidates have:

- A bachelor's degree (advanced degree preferred).
- Senior-level experience in an association.
- Previous experience as the chief staff executive of another organization is also preferred.

Among the skills and knowledge considered most critical to this position are:

- consensus building
- financial management
- forward thinking
- interpersonal skills
- strategic planning
- understanding of the legal system and the work of lawyers
- up-to-date knowledge of technology

Personal Characteristics of the Executive Director

The ideal SDCBA Executive Director candidate will have the following personality characteristics:

- proactive, innovative leader with vision and integrity
- diplomat who unites and invigorates directors, section leaders, members, and the legal community
- personable, attentive, patient, and positive collaborator
- effective communicator who projects positive energy and charisma
- coach/mentor who develops internal team members



- organized manager who is efficient and assertive
- public speaker who reaches out confidently to stakeholders
- strategic planner who multi-tasks, plans effectively, and sets and achieves goals
- team builder who balances conflicting needs and works with diverse individuals
- achiever who implements strategies and policies that build on the commitment and energy of the organization

Measures of Success

The Executive Director will establish goals and strategies in conjunction with the Board of Directors, but success in the position will be determined by:

- demonstrated excellence at implementing SDCBA's mission, vision and goals through projects, services and activities
- prudent and diligent management of significant real estate assets and securities portfolio
- management of and adherence to a detailed budgetary process
- establishing trusting relationships with staff, Board, and partners
- a demonstrated increase in members as well as member satisfaction
- expanding SDCBA's values of diversity and inclusion in organizational programs, strategies and services
- expanded use of technology in the workplace
- overall member satisfaction

II. Organization Review

About San Diego County Bar Association

The San Diego County Bar Association (SDCBA), founded in 1899, is the region's oldest and largest law-related organization representing San Diego's diverse legal community. Its membership includes new and experienced attorneys practicing in various areas of law throughout the county and other legal professionals who support the profession and practice. With approximately 40 unique Sections, Committees, and interest groups, a state-of-the-art full-service member lounge and shared workspace, various community service projects, informal and association-wide networking events, along with more than 300 hours of quality continuing legal education (CLE) and supplemental education programs each year, the SDCBA is the place where San Diego's legal professionals connect and convene for the betterment of their individual practices and the profession.

SDCBA Mission

Inclusion and community define us. Innovation and leadership propel us. Your growth motivates us. Celebrating you and the profession **is** us.

What the SDCBA Stands For

- The SDCBA is a community and serves as the home for San Diego's legal professionals. The SDCBA is the place to build long lasting, meaningful connections.
- The SDCBA values inclusion - the SDCBA welcomes everyone, and everyone belongs.
- The SDCBA are changemakers, leading the way, and innovating to ensure they are at the forefront of change.
- The SDCBA fosters and encourages growth, assisting attorneys in developing their relationships and their practices;
- And the SDCBA recognizes, honors and celebrates lawyers and their important role in our world.



Education

Continuing Legal Education and Other Programs

The SDCBA strives to keep members up to date on the newest developments in specialty areas of practice, on technology trends, the business of managing a law practice, and advice from experts on myriad issues facing lawyers today. The SDCBA offers live and livestreamed CLE Programming, topical roundtable discussions, expert panels, webinars, and more.

Education Program Tracks

- New Attorney Fundamentals — Programs for new attorneys to build practical skills and fundamentals for success.
- Personal Development — Wellness and lifestyle programs to help members connect and promote work life balance.
- Practice Areas — Programs focused on specific practice areas.
- Law Practice Management — Programs focused on the business of starting, running, and marketing your practice.



- Specialty Credits — Programs offering special State Bar MCLE requirements including Legal Ethics, Elimination of Bias, and Competency.
- Diversity — Programs fostering diversity and inclusion in the legal community.
- Law and Technology — Programs focusing on the use of technology in the practice of law.

Advocacy

The SDCBA is proud to be a representative and advocate for the legal profession and a champion of the justice system, and will consider taking a public position or providing comment when the issue educates/informs the public, and is in line with its mission/strategic framework and when such issues may impact:

- Administration of justice (including respect for the rule of law and the judicial branch)
- Diversity and inclusion in the profession
- Professionalism/ethics
- Civility
- Equal justice under the law/civil liberties
- Independence of the judiciary, including criticism of judges
- Constitutional rights that impact the justice system
- Access to justice

Diversity

Cultivating diversity and inclusion is a priority of the SDCBA. The SDCBA is committed to diversity on its Board, Committees, Sections, and among its staff. The SDCBA recognizes the value of diversity across all that it does to ensure an environment of diverse thoughts and voices throughout the Association and legal profession.

Initiatives that support inclusion are a significant part of the Association's work and mission, and throughout the years, the SDCBA has continued to provide, build upon, and support diversity in the legal profession. The SDCBA is committed to promoting inclusion in every aspect of the Association's work. The SDCBA supports inclusion through leadership opportunities, programming and education, its Diversity Pledge, its Diversity Fellowship Program and supporting local diversity bars.

Lawyer Referral and Information Service (LRIS)

Since 1952, the Lawyer Referral and Information Service (LRIS) of the San Diego County Bar Association has been connecting the community with qualified, pre-screened local lawyers and legal

resources. All 400+ lawyers in the LRIS program are required to meet rigorous criteria and be approved by the San Diego County Bar Association LRIS Committee. LRIS is certified by the State Bar of California and the American Bar Association.

Practice Based Sections and Project Committees

- Alternative Dispute Resolution Section
- Animal Law Section
- Appellate Practice Section
- Awards Committee
- Bankruptcy Law Section
- Bar History Committee
- Business & Corporate Law Section
- Civil Litigation Section
- Committee for Diversity and Inclusion
- Community Service Committee
- Construction Law Section
- Elder Law Section
- Eminent Domain Law Section
- Entertainment & Sports Law Section
- Environmental Law/Land Use Law Section
- Estate Planning, Trust & Probate Law Section
- Family Law Section
- Fee Arbitration Committee
- Government Law Section
- Immigration Law Section
- Insurance/Bad Faith Law Section
- Intellectual Property Law Section
- International Law Section
- Juvenile Law Section
- Labor & Employment Law Section
- Law and Medicine Section
- Law Week Committee
- Lawyer Referral & Information Service Committee
- Legal Ethics Committee
- Legislative Committee
- Military Law Section
- Real Property Law Section
- San Diego Lawyer Editorial Board
- Servicemembers Civil Relief Act Committee
- Social Security Disability Section
- Taxation Law Section
- Workers' Compensation Law Section



Board of Directors

The San Diego County Bar Association is governed by an 18-member Board of Directors. Directors are elected at large by the membership, one director is elected from East County, one from South Bay and one from North County. Director elections are held in November of each year. In addition, the chair of the New Lawyer Forum serves as a representative to the Board. The Bar's president is elected by the board from the second and third-year directors in November.

- **Kristin E. Rizzo** *President*
Rizzo Law, PC
- **Lilys D. McCoy**, *President-Elect*
Thomas Jefferson School of Law
- **Stephanie H. Chow**, *Vice-President*
Office of the Attorney General
- **Srinivas Hanumadass**, *Vice-President*
Casey Gerry Schenk Francavilla Blatt & Penfield, LLP
- **Jan K. Maiden**, *Vice-President*
Law Office of Jan Maiden
- **Anna M. Romanskaya**, *Vice-President*
Stark & D'Ambrosio, LLP
- **Johanna S. Schiavoni**, *Vice-President*
Law Office of Johanna S. Schiavoni
- **Frank J. Barone**, *Secretary*
Office of the Public Defender
- **Christopher M. Lawson**, *Treasurer*
District Attorney's Office

- **Judy S. Bae**, *Director*
Miller, Monson, Peshel, Polacek & Hoshaw
- **David A. Fox**, *Director*
Fox Law APC
- **Renée Stackhouse**, *Director*
Stackhouse, APC
- **Patricia P. Hollenbeck**, *Director*
Duane Morris LLP
- **Garrison Klueck**, *Director*
Law & Mediation Firm of Klueck & Hoppes, APC
- **Linh Lam**, *Director*
District Attorney's Office
- **David M. Majchrzak**, *Director*
Klinedinst PC
- **Teodora D. Purcell**, *Director*
Tafapolsky Smith Mehlman LLP
- **Michael R. Finstad**, *New Lawyer Forum Representative*
Finstad Law, PC

III. About Vetted Solutions

The San Diego County Bar Association has retained Vetted Solutions to serve as its partner for this search. For confidential consideration, please contact the search partners below. Interested candidates should submit a cover letter and resume/CV directly to sdcba@vettedsolutions.com.



Catherine A. Brown, CAE, FASAE
+1 310 339 3643



Stephanie MacDonald
+1 951 676 0700



Jim Zaniello, FASAE
+1 202 544 4749

Vetted Solutions is an executive search firm specializing in association, nonprofit, and hospitality/destination marketing community, recruiting and consulting. We focus on CEO and senior staff positions.

For more information about Vetted Solutions, please visit us at:

 vettedsolutions.com  [@vettedsolutions](https://twitter.com/vettedsolutions)  [/vetted-solutions-llc](https://www.linkedin.com/company/vetted-solutions-llc)

Vetted Solutions is a proud member of:

