NEW YORK STATE BAR ASSOCIATION







NYSBA

2012 Section Leaders Quick Reference Guide

Thursday, May 10, 2012

Harvard Club

27 West 44th Street, New York City



NEW YORK STATE BAR ASSOCIATION

One Elk Street, Albany, NY 12207 • 518-463-3200

Section Leaders Quick Reference Guide

Telephone Guide For Staff Assistance

The Association provides for a Department of Section Services with a dedicated Staff Liaison to each Section. The Liaison should be able to answer many questions and give you most of the assistance you request.

Staff Liaisons:

Tiffany Bardwell – (518) 487-5675, tbardwell@nysba.org

Antitrust Law Section, International Section, Real Property Law Section, Young Lawyers Section

Lisa Bataille – (518) 487-5680, lbataille@nysba.org

Elder Law Section; Environmental Law Section; Family Law Section; Food, Drug & Cosmetics Law Section; Health Law Section; Trusts and Estates Law Section

Stephanie Bugos – (518) 487-5524, sbugos@nysba.org

Business Law Section; General Practice Section; Intellectual Property Law Section; Senior Lawyers Section

Elizabeth Gould – (518) 487-5674, egould@nysba.org

Commercial & Federal Litigation Section; Dispute Resolution Section; Entertainment, Arts & Sports Law Section; Labor & Employment Law Section; Municipal Law Section

Patricia Johnson – (518) 487-5688, pjohnson@nysba.org

Corporation Counsel Section, Criminal Justice Section, Tax Section, Torts, Insurance & Compensation Law Section, Trial Lawyers Section

Patricia Wood – (518) 487-5570, pwood@nysba.org Judicial Section

In addition, other Association staff will be pleased to help you in planning and implementing Section activities, and in providing information on procedures or other matters. For handy reference, this guide indicates some of the more frequent inquiries and the corresponding "contacts" for assistance. While other staff members of the various departments may also assist you in these matters, the following identifies key individuals in these particular areas.

FOR ASSISTANCE ON:

- Inquiring about Association policies and procedures Patricia Bucklin (518) 487-5555 pbucklin@nysba.org
- Determining the status of issues addressed or being addressed by the Association
 Patricia Bucklin (518) 487-5555 pbucklin@nysba.org

CONTINUING LEGAL EDUCATION

Continuing Legal Education Dept.

H. DouglasGuevara (518) 487-5580 dguevara@nysba.org

Planning, implementing a CLE book DanielMcMahon (518) 487-5582 dmcmahon@nysba.org

Ordering CLE publications or registering for CLE courses *Call Service Center (518) 487-5609*

FINANCES

Accounting Dept.

Inquiring about financial policies and procedures Kristin O'Brien (518) 487-5510 kobrien@nysba.org Cynthia Gaynor (518) 487-5512 cgaynor@nysba.org

LEGISLATION

Governmental Relations Dept.

Ronald Kennedy (518) 487-5652 rkennedy@nysba.org

Kevin Kerwin (518) 487-5574 kkerwin@nysba.org

MARKETING

Marketing Dept.

Marketing Association Services Richard Martin (518) 487-5676 rmartin@nysba.org

Conducting Section membership satisfaction surveys Connie Schin (518) 487-5687 cschin@nysba.org

MEDIA RELATIONS, COMMUNICATIONS Media Services and Public Affairs Dept.

Notifying the news media of Section programs, positions, actions; Fostering media relations, contacting and responding

to reporters; Media training

Lise Bang-Jensen (518) 487-5530 LBang-Jensen@nysba.org

Developing, submitting news releases on Section programs; Providing public information on the NYSBA website Brandon Vogel (518) 487-5535 bvogel@nysba.org

Submitting Section news to State Bar News Patricia Sears Doherty (518) 487-5536 psearsdoherty@nysba.org

Arranging for photographic coverage of Section events Patricia Sears Doherty (518) 487-5536 psearsdoherty@nysba.org

Gaining information on, developing "Legal Ease" public information pamphlets *Kirsten Downer (518) 487-5552 kdowner@nysba.org*

Communicating with local bars Mark Wilson (518) 487-5540 mwilson@nysba.org

MEETINGS, SECTION PROGRAMS Meetings Dept.

Implementing plans for Section annual and seasonal programs and meetings; implementing MCLE meetings of Section committees

Kathy Heider (518) 487-5500 kheider@nysba.org Lori Nicoll (518) 487-5563 Inicoll@nysba.org Catheryn Teeter (518) 487-5573 cteeter@nysba.org Bryana Wachowicz (518) 487-5630 bwachowicz@nysba.org

MEMBERSHIP

Membership Dept.

Membership Services Patricia Wood (518) 487-5570 pwood@nysba.org

Megan O'Toole (518) 487-5743 motoole@nysba.org

Budgeting Tips For Sections

- 1. Start early. Begin thinking about the section's budget even before the first draft is received in June.
- 2. Talk to your section liaison. He/she knows your section and will be very valuable in assisting in this process. Don't be afraid to enlist other staff members as well. Discussions with staff in the Meetings Department, the Newsletter Department, the Governmental Relations Department and the Membership Department are very helpful.
- 3. Budgets are for the calendar year January 1 to December 31.
- 4. Consider the costs of meeting venues and budget accordingly. Don't forget to calculate and budget the revenue to be received from program registrations.
- 5. Plan for any new initiatives membership campaign, member directory, executive committee retreat or other special function. These should all be included in the budget.
- 6. Balance the budget. Surplus funds accumulated from prior years may be used to balance revenue and expense.
- 7. Consider sponsorship for certain events such as receptions. Extra funds will then be available for other section activities.
- 8. Ask the Accounting Department for additional information. We are happy to give you any needed backup for expenses, as well as provide detail for each of you meetings.
- 9. At a minimum, review the final budget with section officers before submission to the Finance Committee. If possible, have the section's executive committee vote to approve the budget.

Selected Financial Policies as Set Forth in NYSBA's Finance Committee Financial Policy for Sections of the Association

- 1. Annual section budgets should be submitted by mid-August each year to the Senior Director of Finance to be included in NYSBA's budget.
- 2. No section shall have funds or bank accounts of its own, as all financial transactions connected with section activity shall be reflected in the appropriate Association accounts.
- 3. Payment is not authorized for expenditures incurred by any section except as provided for in the budget of such section.
- 4. Sections should structure fees for programs and other functions, or augment fees by means of sponsorship income, to operate such events on a financially self-sustaining basis.
- 5. The Association will bear the cost, not to exceed \$3,500 for any one meeting of staff overtime and reasonable travel expenses. Sections will reimburse the Association for all such staff costs that exceed \$3,500 per meeting.
- 6. Sections may pay an honorarium to speakers at section programs, but only with the prior authorization from the Treasurer or Chair of the Finance Committee.

- 7. Sections may accumulate a reasonable amount of surplus funds which may be carried forward from year to year. Such accumulation should be for long-term purposes designed to benefit the majority of section members.
- 8. Authorization for the expenditure of surplus funds may be obtained from the Finance Committee for expenditures incorporated in the section's annual budget. In all other situations, by the Executive Director for amounts up to \$2,000, the Association Treasurer and Chair of the Finance Committee for amounts between \$2,000 and \$5,000, and by the Finance Committee for amounts exceeding \$5,000.
- 9. Each section may establish guidelines defining travel expenses subject to reimbursement and members eligible therefor, within the limitations as set forth in the financial policy regarding amounts, travel distances and allowable expenses.
- 10. Except as set forth in the financial policy, charitable contributions of Association funds by sections are unauthorized.

MCLE Planning Guidelines:

Summary of Requirements for Attorneys in Practice Beyond the First Two Years After Admission to the Bar

A general MCLE requirement is in effect as of December 31, 1998, and applies to all attorneys in New York. Here is a summary of its provisions:

- twenty-four credit hours must be earned per biennial registration cycle (two years); at least 4 of these credit hours must be earned in the area of ethics and professionalism
- up to 6 credit hours may be carried over from one biennial reporting period to the next
- only accredited courses and programs may be used to satisfy the requirements
- the Board will maintain a list of approved sponsors see listing under CLE at www.courts.state.ny.us

Summary of the Mandatory CLE Rules for Newly Admitted Attorneys During the First Two Years After Admission:

Since the fall of 1997, there has been in place a mandatory continuing legal education (MCLE) requirement in New York that applies to persons admitted after October 1, 1997 (this requirement does not apply to attorneys admitted in New York prior to that date). These MCLE rules require newly admitted attorneys to complete a minimum of 32 hours of accredited transitional education within the first 24 months after admission. In broad brush, here are the features of the MCLE rules for newly admitted attorneys:

- 32 credit hours are required of newly admitted attorneys during the first two years after admission (16 credit hours per year)
- of the 16 credit hours each year, 3 are to be in the areas of ethics and professionalism; 6 in the area of skills; and 7 in the area of law practice management and various areas of professional practice
- except for ethics and professionalism credits, 8 credits (in excess of the 16-hour requirement) may be carried over from the first year to the second year, and 6 credits may be carried over from the second year to the next biennial reporting cycle
- courses taken should be "transitional legal education," i.e., practical skills or basic, entry-level courses
- no self-study, correspondence work, videotapes or audiotapes, motion picture presentations, or courses online may be used to satisfy these requirements, without special approval from the Board, except for those based in law offices outside the United States, who may fulfill up to 12 credit hours through these formats without prior permission from the Board
- only accredited courses and programs may be used to satisfy the requirements

Quick tips:

- For program planning purposes, 50 minutes equals one credit hour of instruction;
- Generally, staff will need eight weeks lead time to adequately prepare and advertise MCLE programs;
- MCLE programs should be priced so that they always cover the Section's costs; a general guide for pricing is \$40 per credit for non-members; the cost for members should be based on overall expenses and should cover the Section's costs.
- Power point presentations by themselves do not qualify for MCLE credit.

If you have questions about the New York State Bar Association's CLE programs and MCLE credits, please contact: Mr. H. Douglas Guevara, Director of Continuing Legal Education, New York State Bar Association, One Elk Street, Albany, NY 12207; phone: (518) 463-3200; fax (518) 463-8844; e-mail: dguevara@nysba.org



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