

Section Do's and Don'ts Tip Sheets
For Section Leaders

NYSBA Section Leadership Conference
May 10, 2007

Accounting Department Financial Tips

Do -

- Do review all financial information with your Executive Committee. Have the annual budget approved.
- Do call with questions when planning meetings.
- Do appoint a long-term Financial Officer. Your section will benefit from the continuity.
- Do try to have sponsors for your meetings. It can make a difference between a loss and a profit.
- Do spend time planning new initiatives and make sure funds are budgeted for these ideas.
- Do ask questions about your monthly financial statements.
- Do work closely with your liaison when preparing your budget.

We wish the Chair to know:

The original budget submitted for approval by the Finance Committee is likely to be approved without question assuming there are no major increases in spending. Budget adjustments received during the budget year are reviewed in detail by the Committee and are not always granted. So, try to plan your year in advance and make sure your original budget has sufficient funds to cover your initiatives.

NYSBA Accounting Department- (518) 487-5511

Kristin O'Brien, Director of Finance
Cynthia Gaynor, Controller
June Lazzaro, Accounting Coordinator
Tracy Risko, Accounting Clerk
Debra Pratt, Accounting Clerk
Maureen Ramirez, Administrative Assistant

Media Services Department Tips

Do -

- Do consult the media relations team when considering an initiative that may garner interest from the media. If you are not certain, please feel free to ask, media services is here to work with all members of the association.
- Do work with the media relations team to aggressively market media/press opportunities that will lead to increased, positive exposure for the Association and/or your Section. Members of the media relations unit will offer opinions as to the “newsworthiness” of any initiative.
- Do promptly return calls to the media. Media members very deadline driven, so promptly returning calls when they come in is extremely important.
- Do prepare adequately when engaging members of the media regarding Section activities. Often the media services unit will refer media inquiries to attorneys based upon their area of expertise. While it is important to return calls quickly, also know that it is perfectly acceptable to tell a reporter you need to get more information on a subject and you will call him or her back.
- Do contact the media relations unit ASAP if a crisis situation has occurred regarding your Section or if something has occurred that could potentially be bad press for the Association. Members of the media relations unit are experienced with dealing with media under less than favorable conditions and could be invaluable in assisting a Section Chair through difficult media interviews.

Don't -

- Don't go into an interview unprepared. Speak to a member of the media on the record until you have had the opportunity to review the subject matter at hand. Failure to do so could cause embarrassment to the individual as well as the Association.
- Don't miss deadlines. If you have told a reporter that you will return a call then you must return that call prior to his/her deadline or risk alienating yourself and the Association for future news opportunities. Like us, reporters have to meet obligations to their bosses and some will hold a grudge if unnecessarily spurned.

Meeting Department Planning Tips

Do -

- Do pick a location accessible to all members
- Do choose a meeting location well in advance (2 years out)
- Do set member and non-member registration fees
- Do set registration fees that will cover the full cost of the meeting, and stay within planning budget
- Do inform all speakers about written requirements for MCLE programs
- Do take advice from Meetings Dept. staff regarding site selection
- Do adhere to deadlines set by Meetings Dept. staff
- Do mail the meeting notice early, send out "Save the Date" notices as soon as date and location are set.
- Do think "diversity" when choosing speakers
- Do make your topics relevant and current

Don't -

- Don't use the same speakers over and over
- Don't choose an expensive location or make your meeting so expensive so as to preclude younger attorneys from attending.
- Don't reuse course materials without updating them

NYSBA Meetings Department- (518) 487-5500

Kathleen Heider, Director of Meetings
Linda Castilla, Meeting Coordinator
Christy Douglas, Meeting Representative
Lori Nicoll, Meeting Representative
Catheryn Teeter, Meeting Representative

CHECKLIST FOR SECTION MEETING BUDGETS

When working up a budget for your section meetings, be sure you include the following items, where appropriate for your meeting, in your budget. These items may apply to each day of your meeting.

Brochure printing and mailing costs

Printing costs for the books

Shipping costs

Continental breakfast

Coffee breaks

Audio visual

Reception (beverages)

Dinner

Transportation costs, if necessary

Hospitality (beverages) charges

Bartender fees

Room rental fees

Entertainment

Speaker reimbursements, i.e., travel? overnight room? complimentary registration fees

Program chair reimbursements

Other meals you may be hosting during the conference

SAMPLE BUDGET
(Based on 275 attendees)

Thursday

Executive Committee break	500.00
Hors d'oeuvres for reception	3,500.00
Beverages for reception	6,500.00
Dinner (food and beverages)	28,000.00
Coffee/dessert (dinner)	6,000.00
Hospitality Suite Bar	6,500.00
Bartender Fees	200.00

Sub-total **51,200.00**

Friday

Committee meetings	3,000.00
General Session continental breakfast	5,500.00
Audio/Visual	1,500.00
Evening speaker	
- Fee	1,800.00
- Estimated airfare	1,000.00
- Accommodation	1,000.00
Hors d'oeuvres for reception	7,000.00
Beverages for reception	6,500.00
Hospitality suite bar	3,000.00
Bartender fees	200.00

Sub-total **30,500.00**

Saturday

General Session continental breakfast	5,500.00
Audio/Visual	1,500.00
Walk/Run	1,400.00
Dinner set up fee	500.00
Decorations for dinner party	6,000.00
Open bar (reception)	5,500.00
Hors d'oeuvres (reception)	5,000.00
Dinner (food)	35,000.00
Dinner (bev)	3,000.00
Hospitality suite beverage	4,000.00
Band for Saturday evening	3,500.00

Sub-total **71,400.00**

Misc.

Estimated speaker expenses	11,000.00
CLE Co-Chairs & Chair Expenses	5,000.00
Signs	550.00
Favors	7,500.00

Sub-total **24,050.00**

Meeting Total **177,150.00**

Suggested registration prices:

2007 Attorney fee: \$650.00

2007 Spouse/guest fee: \$450.00

Legal and Governmental Affairs Department Tips

LEGISLATION

Do –

- **Communicate** with NYSBA leaders and staff regarding the development of legislative proposals. Timely discussion of the issues that a section plans to address, and the section's timetable for addressing them, will assist in navigating the Association's policy-development process and consideration of affirmative legislative proposals by the Association's Executive Committee or House of Delegates. (All legislation that a section wishes to propose must first be approved by the Executive Committee or House of Delegates before it can be submitted to the Legislature.)
- **Coordinate** action with NYSBA leaders and staff to introduce and pursue affirmative legislative proposals that have been approved by the Association's Executive Committee or House of Delegates. Proper and timely coordination of activity will enhance efficient and effective utilization of the Association's resources. *All lobbying activity must be conducted through the Association's Department of Governmental Relations.*
- **Comply** with the state Lobbying Act. State law requires that people who attempt to influence official action on legislation, proposed regulations, or local laws must register with the New York Temporary State Commission on Lobbying ("Commission") and report lobbying activity and related expenses.

Don't -

Do not independently meet with state legislators, members of the Executive Branch, or local officials to support or oppose legislation, proposed regulations, or local laws.

Do not independently write to legislators, members of the Executive Branch, or local government officials in support of or opposition to legislation, proposed regulation, or local laws.

Do not seek introduction of legislation that has not been approved by the Association's Executive Committee or House of Delegates.

Do not give a gift to any public official. (The Commission's Guidelines to the Lobbying Act highlight the following definition: The term "**gift**" shall mean **anything of value** given to a public official including, but not limited to, food, beverages, entertainment or tickets to events where the general public is charged for admission.)

Legal and Governmental Affairs– (518) 487-5653

Kathleen Baxter, Senior Director
Ronald F. Kennedy, Associate Director
Barbara J. Mahan, Administrative Assistant

Marketing Department Tips

Do -

- Make use of the staff support available to your section from the Membership and Marketing Departments.
- Recognize your section/committee members for their participation.
- Use welcome (or welcome back) letters; they are usually the most read piece of communication.
- Make your information available in more than one place. Repetition is key – it usually takes several exposures to a message before it has an impact. An effective campaign will encompass multiple mediums –i.e. email, on your web pages, and a mail piece.
- Consolidate your different e-mail messages into one. More than 3 million e-mail messages were sent in 2005, 3.8 million were sent in 2006, and in 2007 even more e-mail messages will be sent out. We all need to be sensitive to the number of e-mail messages that members receive and try not to overburden them. So when possible, try to consolidate your messages – i.e. upcoming section events, related CLE seminars, relevant publications, etc.
- Know what your members want. If you are not certain about the needs of your members or if your section members have not been surveyed recently, contact the Marketing Department for assistance. In addition to the valuable information obtained, member polls or surveys have the added benefit of getting members involved in the direction of the section and lets them know that your section is genuinely interested in their needs.
- Contact the Marketing Department before beginning a research project. We have access to an efficient online survey process that is self-tabulating, and can assist you with the development of the questionnaire and with the administration of the survey. However, there are certain ways of constructing the questions to make them easier for the survey respondent and more compatible with our online system – we can save you a lot of time and effort if we are brought into the process at the beginning.

Don't -

- Don't assume that e-mail messages reach all of your members. The Association actively solicits e-mail addresses from members, but not all members comply. Currently, the Association has e-mail addresses for approximately 62% of its members. Additionally, because of spam filters,

Marketing Department Tips

Wish Every Section Chair Knew –

- To start transitioning responsibilities to the chair-elect in the months before the current chair's term ends
- Their budget and expenses from year to year; be very cognizant of what they'll be leaving the incoming chair with (don't over spend too early); understand the expenses to be incurred
- To think and communicate electronically, where applicable (rather than print with postage)
- The value of an electronic newsletter
- To develop a Section Leadership Handbook for executive committee members; include job descriptions; planning calendar, etc.; put on Web as resource
- To think beyond the existing paradigm for how they operate, manage and structure their section
- In addition to staff contacts, wish they knew what departments do and what they are responsible for

Don't -

- Wait for members to come to you for information; continually find ways to economically push the information out to them

Marketing Department- (518) 487-5687

Richard Martin, Senior Director
Connie Schin, Marketing Manager

Membership Services Department Tips

Do –

- Make Membership Development a top priority in your Section
- Remember – the Membership Services Department is here to provide you with all the help you need in coordinating your membership recruitment, renewal and new member communication programs. We make it easy for you to grow your Section!
- Remember - you can get a variety of statistical reports and or lists from the Membership Services office, including rosters or lists of your members (broken down by judicial district, for example), prospective members and former members. Section membership reports help you develop an understanding of your Section's members.
- Be sure to appoint a member (or two) to serve as your Section Membership Chair(s).
- Ask for regular reports for your Executive Committee meetings
- Continually look for ways to promote the value of your Section membership to prospective members; remind current members of the value of your Section membership.
- Contact Megan O'Toole to develop a membership plan to help your Section recruit and retain members
- Contact Megan O'Toole (also the Young Lawyers Section Staff Liaison) to find out about opportunities in working with young lawyers and law students
- Engage young lawyers, women and minority attorneys in your Section committees
- Look at what other Sections are doing; check out their Web sites to see how they are serving their members
- Call us for assistance at any time!

Don't -

- Forget how important membership is to the future of your Section
- Forget to continually look for colleagues to join and get involved in your Section
- Wait until the last minute to request membership reports

**NYSBA Membership Services and Chief Section Liaison Office:
518-487-5578**

Patricia K. Wood, Senior Director
Megan O'Toole, Membership Services Manager
Lisa J. Bataille, Chief Section Liaison

Postal Rates Effective May 14, 2007

Newsletters

# Pages	Weight	Regular 1st Class		1st Class Presort		1st Class Presort		Non Profit		Standard Bulk		Standard Bulk	
		Old Rate	New Rate	Old Rate	New Rate	Old Rate	New Rate	Old Rate	New Rate	Old Rate	New Rate	Old Rate	New Rate
4	0.001	0.52	0.80	0.359	0.686	0.195	0.354	0.316	0.477				
8	0.377	0.52	0.80	0.359	0.686	0.195	0.354	0.316	0.477				
12	0.755	0.52	0.80	0.359	0.686	0.195	0.354	0.316	0.477				
16	1.113	0.63	0.97	0.596	0.856	0.195	0.354	0.316	0.477				
20	1.511	0.63	0.97	0.596	0.856	0.195	0.354	0.316	0.477				
24	1.890	0.63	0.97	0.596	0.856	0.195	0.354	0.316	0.477				
28	2.267	0.87	1.14	0.79	1.026	0.195	0.354	0.316	0.477				
32	2.645	0.87	1.14	0.79	1.026	0.195	0.354	0.316	0.477				
36	3.023	1.11	1.31	1.027	1.196	0.195	0.354	0.316	0.477				
40	3.401	1.11	1.31	1.027	1.196	0.198	0.359	0.32	0.484				
44	3.779	1.11	1.31	1.027	1.196	0.213	0.374	0.338	0.502				
48	4.157	1.35	1.48	1.264	1.366	0.226	0.389	0.355	0.519				
52	4.535	1.35	1.48	1.264	1.366	0.241	0.404	0.373	0.537				
56	4.913	1.35	1.48	1.264	1.366	0.255	0.418	0.385	0.554				
60	5.291	1.59	1.65	1.501	1.536	0.269	0.433	0.408	0.571				
64	5.669	1.59	1.65	1.501	1.536	0.284	0.448	0.426	0.589				
68	6.046	1.83	1.82	1.738	1.706	0.297	0.462	0.446	0.606				
72	6.424	1.83	1.82	1.738	1.706	0.312	0.477	0.461	0.624				
76	6.802	1.83	1.82	1.738	1.706	0.326	0.492	0.479	0.642				
80	7.180	2.07	1.99	1.975	1.876	0.34	0.506	0.496	0.659				
84	7.558	2.07	1.99	1.975	1.876	0.355	0.521	0.514	0.676				
88	7.936	2.07	1.99	1.975	1.876	0.369	0.536	0.532	0.694				
92	8.314	2.31	2.16	2.212	2.046	0.383	0.55	0.549	0.711				
96	8.692	2.31	2.16	2.212	2.046	0.397	0.565	0.567	0.729				
100	9.070	2.55	2.33	2.449	2.216	0.411	0.58	0.584	0.746				
104	9.448	2.55	2.33	2.449	2.216	0.426	0.594	0.602	0.764				
108	9.826	2.55	2.33	2.449	2.216	0.44	0.609	0.62	0.781				
112	10.204	2.79	2.50	2.686	2.386	0.454	0.624	0.637	0.798				
116	10.582	2.79	2.50	2.686	2.386	0.468	0.639	0.655	0.816				
120	10.960	2.79	2.50	2.686	2.386	0.483	0.654	0.673	0.834				

CLE Brochures

Non-Profit Letters

<u>Count</u>	<u>Old Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>New Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>Difference Total Cost</u>	<u>Percentage of Increase</u>
19,775	\$2,558.45	\$0.1294	\$2,712.24	\$0.1372	\$153.79	6.0%
31,577	\$4,086.10	\$0.1294	\$4,353.28	\$0.1379	\$267.18	6.5%
51,784	\$6,545.40	\$0.1264	\$6,957.20	\$0.1344	\$411.80	6.3%

TICL

Annual Meeting Notice

Presort 1st Class

<u>Count</u>	<u>Old Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>New Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>Difference Total Cost</u>	<u>Percentage of Increase</u>
5175	\$1,621.91	\$0.3134	\$1,759.44	\$0.34	\$137.53	8.5%

Labor & Employment
NewsLetter

Non Profit Flat

<u>Count</u>	<u>Old Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>New Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>Difference Total Cost</u>	<u>Percentage of Increase</u>
2193	\$701.22	\$0.3197	\$979.84	\$0.4468	\$278.62	39.7%

9x12 Flat Envelope

12 sheets inserted

1st Class Presort

<u>Count / weight</u>	<u>Old Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>New Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>Difference Total Cost</u>	<u>Percentage of Increase</u>
2000 / 2.5 oz	\$1,514.00	\$0.757	\$2,052.00	\$1.026	\$538.00	35.7%
4000 / 2.5 oz	\$3,028.00	\$0.757	\$4,104.00	\$1.026	\$1,076.00	35.7%

6x9.5 Flat Envelope

12 sheets inserted

1st Class Presort

<u>Count / weight</u>	<u>Old Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>New Postage Total Cost</u>	<u>Old Postage Per Piece Cost</u>	<u>Difference Total Cost</u>	<u>Percentage of decrease</u>
2000 / 2.5 oz	\$1,514.00	\$0.757	\$1,220.00	\$0.610	-\$294.00	-19.4%
4000 / 2.5 oz	\$3,028.00	\$0.757	\$2,440.00	\$0.610	-\$588.00	-19.4%

Please note: The mail house charges and additional \$45.00 per 1,000 to fold in half.