



Practice & Interest Group Officer's Manual



MEMORANDUM

To: Committee, Practice & Interest Group Officers

From: Ellen Graham, Director of Membership

Date: July, 2019

Re: CBA Committee and Practice/Interest Group Support and Goals

Congratulations on your appointment as a Cincinnati Bar Association committee, practice or interest group officer for the 2019-2020 Bar year, which runs from May 1, 2019- April 30, 2020. We are thrilled that you have chosen to commit your time and energy to the CBA, your colleagues and the entire legal community through leadership of your group.

At the CBA, we are constantly growing and evolving to meet the needs of our members. We are invested in the success of member groups and are happy to support you with coordinating meeting logistics, sending member communications and CLE planning. We are also happy to assist you by connecting you to other CBA members, arranging meetings at off-site locations, creating and sending electronic surveys to your membership, assisting you in planning networking events and arranging lunches (one free lunch is provided to each group during the 2019-2020 Bar year). CBA staff will also work with each member group on CLE programming, including one event at a special \$10 per hour rate at one regularly scheduled meeting during the 2019-2020 fiscal year. (Contact Lynne Miller at least 60 days in advance of your program at 699-1401 or lmiller@cincybar.org)

CBA Mission statement

To promote professional excellence, foster justice, serve our members and educate the public.

CBA Vision statement

To be an invaluable resource to our legal community by:

- encouraging a culture of collegiality and professionalism;
- providing opportunities for leadership and community service;
- maintaining a diverse and inclusive membership; and
- empowering the success of our members.

The CBA is invested in ensuring your success as a leader of a committee, practice or interest group. Our goal is to help you and your group be successful.

Your ideas and plans for the 2019-2020 year will continue to positively impact the CBA members. The CBA members and staff appreciate your leadership. Please feel free to contact me at (513) 699-1406 or at egramham@cincybar.org if I may be of assistance.

Table of Contents

Organizational Chart3

Group Meetings5

Guidelines.....6

Sponsorship Program.....7

Officer Duties & Responsibilities.....8

CBA Report..... 10

CLE Guidelines..... 12

Group Leadership..... 14

CBA Board & Staff..... 16

Organizational Chart





Practice and Interest Group Guidelines

Meetings at a Glance

Meeting Planning Timeline	<p>January-March: Officers plan for new bar year with Membership and CLE teams.</p> <ul style="list-style-type: none"> • Topics to be discussed: <ul style="list-style-type: none"> · Succession plan · Group year re-cap · Topics and speakers for new year · Meetings and CLE dates
Prior to Meeting	<p>Three Weeks Prior</p> <ul style="list-style-type: none"> • Meeting content due to CBA staff liaison <ul style="list-style-type: none"> · Meeting Agenda · Topic · Speaker · Speaker bio and picture if available · Audio/Visual needs · Additional advertising needs <ul style="list-style-type: none"> · E-News · Social Media · Extra meeting announcements <p>Two Weeks Prior</p> <ul style="list-style-type: none"> • Meeting Notice sent to group members <p>Day Before Meeting</p> <ul style="list-style-type: none"> • Handouts sent to staff liaison for printing • Presentations sent to staff liaison for A/V setup if needed
During Meeting	<p>CBA Staff Greeter</p> <ul style="list-style-type: none"> • A representative from the CBA will be available before and after your meetings to provide assistance, answer questions, and set up equipment. <p>Attendance Sheet</p> <ul style="list-style-type: none"> • Will be posted at the back of the room. <p>Welcome/Introductions</p> <ul style="list-style-type: none"> • Please take a moment at each meeting to introduce yourself and your speakers. It may also be helpful to go around and welcome any newcomers.
After Meeting	<p>Meeting Attendance Sheet:</p> <ul style="list-style-type: none"> • You may request a copy

Guidelines

Meetings

Scheduling

- Please review your 2019-2020 Group meeting schedule available on the CBA Website. Please note: unless you notify the staff liaison at the CBA of an alternative meeting schedule, your group meetings will be held on the dates assigned at 12:00 noon. A notice will be emailed to members at least one week before each regularly scheduled meeting. For special meetings or changes to your schedule, contact the staff liaison as soon as possible to reserve space.
- To request another group be included in the invitation to your meeting, you must first contact that group's Chair to confirm their interest. Once the other chair agrees, please email the staff liaison to let her know. Note that the number of additional groups may be limited by the CBA.

Attendance List

At each meeting you will be given a printed list of all registered attendees. Please encourage all attendees to sign in. CBA staff will update your attendance records following your meeting. This attendance list is important for managing your programs for this year and determining your group's needs, and anticipating programming for the following year.

Audio-visual equipment

The following audio-visual equipment is available to use at meetings:

- Podium
- Skype Conference Calling
- Microphone
- LCD Projector
- Laptop Computer

Please contact the staff liaison at least one week in advance to schedule the AV equipment.

Budgeting

The CBA's fiscal year runs May 1- April 30. Meeting notices, minutes, & limited copying of materials provided for in the budget for group meetings. To request additional budget items for the next fiscal year, please contact Ellen Graham by January. The requests are forwarded to the Budget Committee for review and recommendation to the CBA Board of Trustees. The Board of Trustees approves the budget in April of each year. Budgeting for CLE programs is handled separately from the group budget.

Unbudgeted requests

Any expenditures of funds not already budgeted in the current CBA budget must be approved in advance by the Board of Trustees. Requests for unbudgeted expenditures should include detailed expenses as well as the anticipated source of funding (even if that is only general bar revenues).

Please send requests to Ellen Graham at least five weeks prior to the date of expending the funds. The request will be reviewed by the Member Services & Development Committee and a recommendation made to the Administration and Finance Committee which will make a recommendation to the CBA Board of Trustees. The Board will not consider requests with less than one week's notice except for emergencies.

The CBA's Sponsorship Program

The Cincinnati Bar Association has developed a sponsorship program to ensure the vitality of the organization and build partnerships that will benefit our practice groups and members. When a sponsorship is secured for a group or event, you will see that company's name and logo on a variety of your group's materials and representatives from the sponsoring company will have a presence at the event or groups meeting.

As we continue to grow our sponsorship programs, we anticipate being able to reinvest our revenues into programs that bring the most value to our members.

Sponsorship Recruitment for Meetings and Events:

Chairs are often approached by businesses that cater to lawyers and their practices (i.e. insurance companies, accountants, technology experts, etc.) to sponsor a group meeting. Should you be asked this question, please refer them to Erin Emerson, Director of Marketing at emerson@cincybar.org. Erin will work with the speaker or potential sponsor and CBA member group chair directly to determine the best date, topic, sponsor benefits and cost of the sponsored event. Because the CBA always wants the best possible outcome of each of our events, this direct connection will assure that the expectations of both the CBA group and the speaker/company are met. If you have an event that you feel would benefit from having a sponsor, please reach out to Erin at least 90 days in advance to make sure that we are able to create a partnership beneficial to your group and the sponsor.

Speaker Ideas from the Director of Marketing:

There will be occasions where the Marketing Department is approached by a Business Affiliate member who is interested in providing content in the form of speaking at a committee/group meeting. Should your committee/group be of interest, Ellen Graham will contact you to determine interest and work with the chair moving forward.

Any sponsorship questions? Please contact Erin Emerson at emerson@cincybar.org

We appreciate your support of CBA's Sponsorship Program and growing partnerships!

Officer Duties & Responsibilities

Officers of committees and groups serve as fiduciaries of the CBA and, therefore, are called to act in the best interest of the CBA while serving in that role. In the event of a conflict of interest, an officer shall notify the CBA. Available positions include but are not limited to:

Chair

- Establishes a regular meeting schedule and coordinates all dates with Ellen Graham at the CBA.
- Sets the agenda for each meeting and sends it to the Director of Membership at least two weeks prior to the meeting.
- Presides over meetings, ensuring that the meetings follow the agenda and stay on schedule.
- Notifies Ellen Graham, Director of Membership for the CBA of any action that the group has taken, or will take, which requires approval by the CBA Board of Trustees.
- Sets the group's goals and objectives for the year along with the other group officers including establishing a CLE seminar date.
- Recommends candidates to serve as Vice Chair, Secretary and CLE Coordinator for the succeeding Bar year to assure appropriate succession of officers and continuing member group growth.
- Has ultimate responsibility for CLE seminars.

Vice-Chair

- Automatically succeeds to the position of chair, if recommended and approved by the Board of Trustees.
- Recruits speakers for meetings, in collaboration with group leaders.
- Responsible for recruiting new group members and enhancing the participation of current members.
- Acts as CLE Coordinator in the absence of an appointed CLE Coordinator.
- Presides over group meetings in the absence of the chair.
- Works with the chair to assist in proposing a candidate to serve as Secretary and CLE Coordinator for the succeeding Bar year.
- Sets the group's goals and objectives for the year along with the other group officers including establishing a CLE seminar date.

Secretary

- Automatically succeeds to the position of vice chair, if recommended and approved by the Board of Trustees.
- Prepares minutes of each meeting.
- Communicates with staff liaison about any special correspondence to the group members.
- Sets the group's goals and objectives for the year along with the other officers including establishing a CLE seminar date.

CLE Coordinator

- Familiarizes him or herself with the CLE procedures & guidelines, statements of general CLE policies, and CLE co-sponsorship policy available at www.cincybar.org.
- Performs duties as noted in the CLE procedures & guidelines
- Contacts CBA CLE representative at the beginning of the bar year to set a meeting of the officers and/or CLE planning group to discuss CLE goals, time table and budget for the year.
- Is observant of opportunities to serve members through new CLE programming, sharing ideas and suggestions with the CBA CLE staff during the year.

CBA Board Liaison

The CBA Board member liaison will be a liaison between their assigned group and the CBA Board. The liaison program is designed to be a resource for you and your group to drive engagement and grow your group membership. One member of the CBA Board may be assigned to your group to ensure cooperative efforts and affirm support.

- Communicate with group chair and attend meetings to assess the success of each group.
 - o Success will be determined by the membership, attendance of meetings, and CLE's.
- Actively recruit members to join CBA and practice group.
- Communicate with CBA Board concerning group's needs and initiatives.
- Initiate succession planning for each group.

YLS Liaison

The YLS member liaison will be a liaison between the YLS and their assigned group. The liaison program is designed to be a resource for you and your group to drive engagement and grow your group membership.

- Attend at least 50% of practice group events including: meetings, socials, CLEs.
- Report to practice group on YLS initiatives.
- Report to YLS Membership on practice group initiatives.
- Actively recruit members to join YLS and practice group.
- Write one CBA article or blog post per CBA year.
- Assist in YLS substantive program planning.

Report Submission Guidelines

The CBA Report is a membership publication designed to inform readers about current topics and events in the local legal community. When submitting an article for publication, please consider the following guidelines:

Type of Article

The Report focuses on current events in the law, as well topics of general interest to the Greater Cincinnati legal community. Articles should focus on practical issues, not theoretical or esoteric points. The editor will consider running articles previously published, but as a general rule prefers articles that have not been previously published. The CBA gives preference to CBA members submitting articles for publication, but will also consider articles written by non-members as long as the article is of general interest to the local legal community. The editor will review all documents submitted and reserves the right to edit content for clarity and/or reject any submissions. Any major revisions necessary will be discussed with the author.

Writing Style

Please write concisely and clearly. Avoid copying the style of law reviews, academic journals or legal briefs. Only under special circumstances will the Report publish scholarly articles.

Length

Departmental columns, such as the President's Brief, and other regular columns, should be no longer than approximately 600 words. Feature articles, including citations, should be no longer than 1,800 words (approximately 7 double-spaced, typed pages). Shorter columns and anecdotes are also welcome. Please include a two or three sentence biography to run at the end of the article.

Editing

All articles will be copyedited to conform to house style.

Benefits of Being Published

Given the CBA's nonprofit status, writing for the CBA Report is done on a volunteer basis. Benefits of being published include writer attribution, marketing exposure to members of the Greater Cincinnati legal community, and the opportunity to earn CLE credit from the Ohio Continuing Legal Education Commission. Additionally, an electronic copy of your published article (PDF format) can be provided for your marketing/distribution use.

Copyright

In submitting an article to the Report, authors grant to the Cincinnati Bar Association First North American serial rights together with non-exclusive print and digital republication and reprint rights. The author warrants that the article is her/his original work and that its publication by the CBA will not infringe upon the copyrights or other rights of any other person or entity.

Format

Please submit articles by email to ataylor@cincybar.org, in a Microsoft Word document (.DOC), Word Perfect file (.WPD) or Rich Text File (.RTF). Do not format into columns, boxes or use color. A brief author bio of no more than 45 words should accompany the submission.

A cover letter with the author's name, address, phone number, and where appropriate, disclosure of interest, can accompany the submission.

Graphics/Photos

Please include a high-resolution color photo of the author.

The CBA Report will obtain appropriate artwork or photos, where necessary, to illustrate an article. Suggestions are welcome. Any artwork or photos submitted to the Report will be used at the discretion of the editor and graphic artist.

All photos submitted must include a cutline identifying the people included in the picture. The graphic artist reserves the right to make whatever layout changes that are necessary to enhance the visual appearance of the publication.

Deadlines

The CBA Report is a bi-monthly publication. Articles to be considered for publication must be submitted to the editor at least four weeks prior to the publication date, i.e., an article for the March publication should be submitted at the very latest by Feb. 1. Due to the amount of material received, time, and budget constraints, there will be no exceptions to this deadline. Please see attached schedule.

Please send submissions to Aris Taylor at ataylor@cincybar.org

2019-2020 Schedule

The CBA Report runs on a six-week time frame. All requests for information to be included in the publication must be given in writing to the editor and graphic artist six weeks prior to the publication date. This is the request date. All articles must then be submitted to the editor two weeks later, which is four weeks prior to the publication date. The current CBA Report schedule is listed below.

Request Date	Submission Date	Publication Date
June 1, 2019	June 15, 2019	July 15, 2019
August 1, 2019	August 15, 2019	September 16, 2019
October 1, 2019	October 15, 2019	November 15, 2019
December 1, 2019	Dec. 15, 2019	January 15, 2020
February 1, 2020	February 15, 2020	March 16, 2020
April 1, 2020	April 15, 2020	May 15, 2020

CLE Guidelines

Getting Started

Before you begin planning a CLE seminar, please talk to your CBA CLE staff contact. She is an integral part of the planning process and looks forwards to helping you plan and host successful CLE programs.

Tips for Producing an Engaging Seminar

- Use different formats (panel discussion, hypotheticals, demonstration, audience polling, etc.) to keep the program engaging. Involve the audience as much as possible in the seminar.
- Teach the attendees a new skill or a new way of doing something that will save them time and money or otherwise improve their practice. Share information on best practices and how to avoid common mistakes.
- Provide handouts with information that attendees will refer to and use back in their offices like sample forms, pleadings, and drafting language.

Policies & Procedures

Seminar pricing and administrative policies are set by the CBA Board of Trustees as detailed in the Statement of CLE Policies. In addition, co-sponsorship of CLE programs is governed by the CBA's CLE Co-Sponsorship Policy available at www.cincybar.org.

Timeline for Planning & Facilitating a Successful CLE Program

Months/Weeks from Event	Committee Responsibilities	CBA CLE Staff Responsibilities
Annually	Appoint a member of your committee to serve as CLE Coordinator or seminar chair. Recruit CLE planning committee members (if needed).	Manage the CLE program through communication, planning & administration.
12 to 6 Months	<ul style="list-style-type: none">• Inform CBA staff contact of seminar plans. Arrange a meeting with the CBA staff contact and any other planning committee members.• Request/confirm a program date.• Schedule a meeting with CBA staff contact and planning committee to discuss program planning, develop program outline, etc.• Continue with program planning.• Consider potential program sponsors.• Invite and confirm speakers.	<ul style="list-style-type: none">• Serve as liaison with CLE committee, facilitate planning meetings, and keep committee updated on seminar planning and scheduling.• Provide planning committee with available dates.• Meet with seminar leaders, provide past attendance information, planning & marketing deadlines, and program administration/budget information.
4 to 3 Months	Submit final program outline (with speaker names and contact information, presentation titles and timed agenda) to CBA staff contact.	Review draft; make suggestions if necessary.
3 months	Review brochure.	Work with graphic artist to create program brochure.
3 to 2 months	Begin promoting event to colleagues and interest groups (ongoing).	<ul style="list-style-type: none">• Begin event promotion via email and social media platforms (ongoing).• Contact speakers to confirm presentation details, including the deadline for submission of bios and handouts and AV needs.

2 months	Provide CBA staff contact with a brief description about the seminar that can be featured in the <i>CBA Report</i> .	<ul style="list-style-type: none"> • Submit seminar promotion for inclusion in <i>CBA Report</i>. • Process program registrations (ongoing). • Apply for CLE credit.
1 month		Provide program update to planning committee.
2 weeks		Collect & Compile handouts.
1 week	<ul style="list-style-type: none"> • Confirm program arrangements with CBA staff contact. • Touch base with speakers to re-confirm details. 	<ul style="list-style-type: none"> • Confirm all related logistics. • Distribute seminar eHandout (where applicable).
Day of	<ul style="list-style-type: none"> • CLE Coordinator, seminar chair or designee arrives at least 15 minutes prior to start of the program. • Coordinate/make opening remarks and speaker introductions 	<ul style="list-style-type: none"> • Ready facility (including AV equipment and food & beverage), registration materials and handouts. • Provide script for opening remarks and welcome slides.
Post-seminar	Follow-up to thank speakers. Participate in wrap-up meeting.	<ul style="list-style-type: none"> • Follow-up to thank speakers. • Process and submit CLE credit. • Tabulate program evaluations, schedule wrap-up meeting to review evaluations. Discuss preliminary considers for next year's event.

Visit www.cincybar.org for general CLE policies

CLE Team Contacts:

Lynne Miller, Director of CLE
lmiller@cincybar.org, 513-699-1401

Angela DeMoss, CLE Assistant
ademoss@cincybar.org, 513-699-4010

Groups & Committee Leadership

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Laura W. Wilson, *Chair*

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Hon. Jeffery P. Hopkins, *Co-Conveners*

CALL

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Rebecca Ann Zimmelman

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Abby Chermely & Laura Elizabeth Thudium

Mock Trial

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Elizabeth A. Meiszer

Run for Kids

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David J. Oberly

Social

Ryan W. Goellner & Cindy J. Moore

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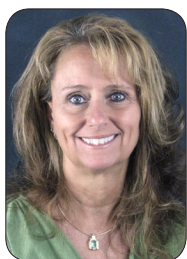
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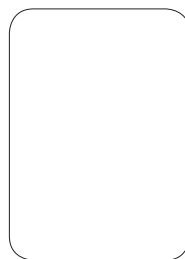
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Educational Topics

- “Coworking” vs “Proworking” and are either a legitimate option for your firm
- How to prepare your firm’s office for the future
- What the quality of your office says about your firm



Fifth Third Insurance (formerly RG McGraw Insurance Agency)

38 Fountain Sq Plaza
MD 10AT5R
Cincinnati, OH 45202



Graham Vollmer
Vice President, Fifth Third Insurance
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Educational topics I could present:

- 1. Business Insurance** – The importance of a comprehensive analysis to ensure that your clients businesses are being adequately protected.
- 2. Cyber Insurance** – Are you and your clients prepared for the ever growing threat of cyber-attacks and data breach incidents?
- 3. Estate Planning & Protection** – Do your clients have adequate coverage in place to protect their personal assets against a significant claim?

We are the only professional liability insurance provider exclusively devoted to leading the effort of protecting Ohio's lawyers and law firms.

[Educational Topics]

1

Protecting the law firm against a cyber or data breach.

2

Understanding legal professional liability insurance, what it covers, what it doesn't, the coverage terms of art, and what carriers are looking for in their analysis of policy applications.

3

Law firm planning for the unexpected.



Call Steve to learn more about our educational topics and to set up a speaking engagement.

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Ohio Bar Liability Insurance Co.