



Practice & Interest Group Officers' Manual



MEMORANDUM

To: Committee, Practice & Interest Group Officers
From: Ellen Newman, Director of Membership
Date: May, 2018
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 2018-2019 Bar year, which runs from May 1, 2018- April 30, 2019. 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 2018-2019 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 2018-2019 fiscal year. (Contact Dimity Orlet at least 60 days in advance of your program at 699-1401 or dvorlet@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 2018-2019 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 enewman@cincybar.org if I may be of assistance.

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- CBA & CBF Board of Trustees
- CBA Staff Members

Committee Organizational Chart





Practice and Interest Group Guidelines

Meetings at a Glance

<p>Meeting Planning Timeline</p>	<p>January-March: Officers should meet with Membership and CLE team to plan new bar year. Topics to be discussed: Succession plan Group year re-cap Topics and speakers for new year Meetings and CLE dates</p>
<p>Prior to Meeting</p>	<p>Three Weeks Prior Meeting content due to CBA staff liaison Meeting Agenda Topic Speaker Speaker bio and picture if available Audio/Visual needs Additional advertising needs E-News Social Media Extra meeting announcements</p> <p>Two Weeks Prior Meeting Notice sent to group members</p> <p>Day Before Meeting Handouts sent to staff liaison for printing Presentations sent to staff liaison for A/V setup if needed</p>
<p>During Meeting</p>	<p>CBA Staff Greeter A representative from the CBA will be available before and after your meetings to provide assistance, answer questions, and set up equipment.</p> <p>Attendance Sheet Will be posted at the back of the room.</p> <p>Welcome/Introductions Please take a moment at each meeting to introduce yourself and your speakers. It may also be helpful to welcome any newcomers.</p>
<p>After Meeting</p>	<p>Meeting Attendance Sheet: You may request a copy</p> <p>Meeting Minutes: Group Secretary or designated officer sends meeting minutes and other handouts to staff liaison to be uploaded to group webpage or handed out at next meeting date.</p>

Guidelines

Meetings

Scheduling

Please review your 2018-2019 Group meeting schedule available on the CBA website. Please note: unless you notify 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 them know. Note that the number of additional groups may be limited by the CBA.

Agenda, Minutes and Materials

The designated officer from your group should send your agenda, minutes, topic/speaker information, and any other enclosures at least two weeks before your meeting to the staff liaison. This timeframe will ensure that your group's meeting notice is sent in a timely manner. Listed below are guidelines for constructing a group email:

- **Agenda** Identifies topics and speakers
- **Minutes** Follows the agenda and provides a brief synopsis of the discussion and any action taken. This will ensure that the minutes are clear for those who did not attend.
- **Materials** Meeting notices are emailed to members. Handouts need to be sent to the staff liaison at least two days prior to the meeting. If handouts are brought to and distributed at the meeting (not copied by the CBA), a copy needs to be given to the staff liaison immediately following the meeting to retain in that group's file.

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 Conferencing
- 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 member group meetings. To request additional budget items for the next fiscal year, please contact Ellen Newman 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 member group budget.

Unbudgeted requests

Any expenditures of funds not already provided for 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. Please see the below CBA Sponsor Program for more details.

Please send requests to Ellen Newman 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.

Highly Functioning Committees and Groups

A highly functioning group is one that:

- Conducts pre-planning of its events for the CBA calendar year, and sends an outline to the MS&D Committee by April 1 of each year of said events;
- Conducts a minimum of four events in a calendar year (meetings/CLE/socials); if a conflict exists for any such event, the committee will find

alternative avenues to ensure the event occurs including, but not limited to:

- Has growth in attendance at meetings and CLEs and/or remains consistently strong in attendance at meeting and CLEs;
- Hosts qualitative meetings with specified topics and/or speakers at each meeting; and
- Has at minimum three officers in place.

If a member group has not continually met the above criterion for two-years, the following must occur:

- The group chair must meet with the Director of Membership; In this meeting the chair and the Director of Membership will outline a plan for events and membership of the group for that calendar year.
- The group chair must implement the above plan, and follow to the best of its ability, the guidelines for a highly functioning committee/group.

If the committee/group fails to become highly functioning within one-year, the CBA may take steps to either sunset the committee/group or combine with a related committee/group.

Speaker Conduct at Continuing Legal Education Seminars and Group Meetings

Offensive or off-color jokes and stories are never appropriate at CLE presentations or at regular committee/group meetings. While we cannot guard against everything a speaker might say, it is very important to advise them that we do have prohibitions for this type of conduct. What is humorous to one individual may be offensive to another, so please caution your speakers to be careful and appropriate with the content of their presentations.

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 elemerson@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 Newman will contact you to determine interest and work with the chair moving forward.

Any sponsorship questions? Please contact Erin Emerson at elemerson@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.

Chair

- Establishes a regular meeting schedule and coordinates all dates with Ellen Newman 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 Newman, 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.
- Prepares a report and recommendation to MS&D and CBA Board of Trustees to nominate a candidate 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 Director of Membership 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.
- Works with the chair to assist in proposing a candidate to serve as Secretary and CLE Coordinator for the succeeding Bar year.

CLE Coordinator

- Familiarizes him or herself with the CLE procedures & guidelines, statements of general CLE policies, and CLE co-sponsorship policy contained herein.
- 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 will 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.
 - 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.



MEMORANDUM

To: Practice and Interest Group Leaders
From: Aris M. Yowell, Director of Communications
Date: May, 2018
Re: Communications Guidelines

Thank you for your commitment to the Cincinnati Bar Association! Over the coming year, the CBA communications department will be involved with helping to promote your group events and programming through the *CBA Report*, email, our website and our social media presence. We just ask for your help in identifying what you would like to promote, and we will work to communicate your initiatives to CBA members.

We welcome and encourage all officers to contribute at least one substantive article to the *CBA Report*. This will help us keep our magazine content diverse and keep your practice or interest group top of mind for our members. I look forward to speaking with you about your article(s). Please contact me to start collaborating on content, and to select the best issue for your piece to be featured.

Communications and Member Groups

There are a number of things that may come up during your involvement with your committee or group that would be good opportunities to engage the communications department. Keep us in the loop if:

- You have an event or speaker you believe is press worthy.
- You or a representative of your group would like to contribute to the *CBA Report* or discuss Report ideas.
- You would like to see something featured on our website or social media platforms.
- You need help preparing for an interview with a reporter or have been asked to represent the CBA in an interview.
- You have an idea for something we can promote or a new way to promote the activities of your group.

If you would like something posted for you to your group website or any of our other social media channels, we ask that you please submit one week in advance of the posting date. The *CBA Report* runs a month arrears in deadlines, so if you would like to contribute something to the *August Report*, please submit by July 1.

Policies

All of the communication policies you may need throughout the year are available on our website. Please note these policies in particular:

- In the unlikely event a member of the media contacts you as a representative of the CBA, please refer them to me. Our media policy requires that our president or executive director serve as our main media contact.
- You may hear from me regarding an interview opportunity with the local media. In these instances, you would simply be an expert in the field and not a representative of the CBA.
- The CBA is unable to send out emails for non-CBA programs or CLEs.

Additional Information

We have a multitude of resources available to you online if you have any questions. Communications policies and information include:

Communications Policy and Procedures – This provides information on the CBA’s media policies and tips for preparing for interviews

Social Media Policy – Our policy on what can and cannot be posted through our social media channels

Email Policy – Referenced previously, the entire policy is available online

CBA Report Guidelines and Deadlines – This includes information on how and when to submit to the CBA Report

To access these documents, go to www.cincybar.org and click on “Committees/Groups,” then “Committee Manual.”

If you have any questions or communication ideas, please contact me.

Thank you,

Aris Yowell
Director of Communications
amyowell@cincybar.org

The Cincinnati Bar Association is a nonprofit organization serving the legal needs of the Cincinnati community. As one of the oldest and largest local legal associations in the United States, the Cincinnati Bar Association is committed to providing information relating to the legal community and legal education.

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

When submitting an article, the preferred format is electronic or by email to amyowell@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.

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 monthly publication. It is distributed on the first of each month. 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: amyowell@cincybar.org

Or: Aris Yowell, CBA Report,
Cincinnati Bar Association

225 E. Sixth Street, 2nd Floor, Cincinnati, OH 45202-3209
Phone: (513)699-1391; Fax: (513)381-0528

2018-2019 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
July 18, 2018	August 1, 2018	September 1, 2018
August 17, 2018	August 31, 2018	October 1, 2018
September 17, 2018	October 1, 2018	November 1, 2018
October 18, 2018	November 1, 2018	December 1, 2018
November 16, 2018	November 30, 2018	January 1, 2019
December 18, 2018	January 1, 2019	February 1, 2019
January 18, 2019	February 1, 2019	March 1, 2019
February 15, 2019	March 1, 2019	April 1, 2019



Cincinnati Bar Association CLE Planning Guidelines

MEMORANDUM

To: Committee Leaders
From: Dimity Orlet, Assistant Counsel & Director of CLE
Date: May, 2018
Re: CLE Opportunities

CLE events are a fantastic way to serve and engage your members and others in the Greater Cincinnati legal community. Thanks to the contributions of leaders like you, committee and practice group seminars have always been at the heart of the CBA's CLE offerings.

CLE team members Angela DeMoss, Amberly Rutherford and I look forward to working with you. Our goal is to support each member group in hosting at least one CLE program per bar year. In addition, we encourage you to take advantage of the CBA's "special committee CLE offer," which provides each committee the opportunity to host one one-hour CLE program per bar year (in place of a regular meeting) at a reduced registration fee of \$10 for members of your group. Committee members also have the option of attending this meeting at no cost if they do not wish to claim CLE credit. 60-days' notice is required for the "special committee CLE."

A copy of the CBA's CLE Planning Guidelines, which detail the planning process, are attached. Please review the planning guidelines to familiarize yourself with the process. The biggest take away is that advance planning is crucial. Because of the lead time required to properly plan and market a quality program, we should begin working on full and half-day seminars at least six months before the event is set to occur. Shorter programs can be planned with a bit less lead-time, but earlier is always better!

Thank you for your time and interest. We look forward to working with you!

Dimity Orlet, *CLE Director/Assistant Counsel*.....(513) 699-1401 or dvorlet@cincybar.org

Amberly Rutherford, *CLE Program Coordinator*.....(513) 699-1397 or arutherford@cincybar.org

Angela DeMoss, *CLE Assistant*.....(513) 699-4010 or ardemoss@cincybar.org

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, attached as Appendix 1. In addition, co-sponsorship of CLE programs is governed by the CBA’s CLE Co-Sponsorship Policy, attached as Appendix 2.

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. • 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	<p>Follow-up to thank speakers.</p> <p>Participate in wrap-up meeting.</p>	<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.

Appendix I

Statement of General CLE Policies

CLE Accreditation

The CBA accredits the vast majority of its programs for CLE in Ohio, Kentucky, Indiana and Pennsylvania. However, due to variations in CLE rules across jurisdictions, CLE credit may not be available for all of these states for every program. The amount and type of credit available for a specific program will be published on the promotional material and/or on the CBA website for that program. At the attendee's request, the CBA will provide documentation for self-reporting to other jurisdictions.

It is the CBA's policy to comply with the above stated jurisdictions' deadlines for the submission of CLE applications. The filing of untimely applications reflects poorly on the CBA and has the potential to negatively impact the CBA's status as an established CLE sponsor. Therefore, it is the CBA's policy not to file late applications for CLE credit.

Live CLE Program Pricing

Registration fees for live CBA CLE programs shall be based on the following minimum pricing established by the CBA Board of Trustees effective January 2008:

CBA Members: \$35/credit hour

Non-Members: \$50/credit hour

For seminars involving extraordinary expenses such as speaker honorariums, speaker travel, or meals other than continental breakfast, the registration fee for the seminar shall be adjusted upwards if no sponsorship exists to underwrite the additional expense.

Registrations fees for specific programs will be as published by the CBA via its website or printed promotional material. Pro-rated fees and complimentary fees for auditing a program without claiming CLE credit are not available.

Special Pricing for Live CLE

The following discounts are approved as exceptions to the CBA's regular CLE program pricing:

CLE Season Passes

12-Hour Pass: \$270 (\$22.50 per credit hour)

6-Hour Pass: \$156 (\$26 per credit hour)

Available for purchase for a limited time each bar year by CBA members only.

CBA Young-Lawyer Member: \$15 for No Brown Bag CLEs

CBA New-Lawyer Member: Starting at \$15/hour

CBA Law-Student Member:

-Full-Day/\$50

-Half-Day/\$25

-Less than Three Hours/Free

Non-Attorney Support Staff: 50% off the applicable member or non-member attorney registration fee

Complimentary Registration: Members of the program faculty and planning committee for a particular program are invited to attend that program at no cost.

CBA Committee CLE Offer: Once per bar year, each CBA committee may offer one one-hour CLE program in place of its regular committee meeting. Members of the committee may earn one hour of CLE credit for \$10 or may opt to attend at no cost if they do not wish to claim credit.

The CLE Director shall retain the discretion to extend discounted pricing or complimentary registration to specific individuals in special circumstances. For example, an invitation for discounted or complimentary registration may be made on occasion to contributing members of the CBA or to members of board level committees.

Self-Study CLE

The CBA offers self-study CLE programming through collaboration with the Ohio Metropolitan Bar Association Consortium. Pricing for self-study programs is set by agreement of members of the consortium in consultation with a third-party provider.

Cancellations/Refunds

The CBA's default cancellation policy is as follows:

Cancellations received by noon the business day prior to the seminar will be refunded less a \$25 cancellation fee. Individuals who cancel after this time, or who are no-shows, will receive course materials in lieu of a refund.

The CBA's policy for cancellations and refunds for a specific program will be stated on the promotional material for the program. Where such language differs from the CBA's default cancellation policy, the policy stated on the promotional material is controlling.

The CLE Director and the CBA CLE staff shall retain the discretion to permit individual exceptions to the cancellation/refund policy in special circumstances such as illness or family emergency. Such discretion includes the authority to transfer an individual to another program without penalty.

Substitutions

The CBA will generally allow the substitution of one attendee for another at any time and without penalty.

Approved by the CBA Board of Trustees on January 25, 2012; Revised to include CLE Season Pass Discounts approved by CBA Board of Trustees on December 18, 2013.

Appendix 2

Cincinnati Bar Association Policy on Co-Sponsored CLE Programs

The Cincinnati Bar Association's primary method of offering continuing legal education is through sole sponsorship of programs created and presented on a voluntary basis by attorneys. Often, however, the CBA is approached with requests to co-sponsor CLE programs. In order to review these requests on a consistent basis, the CBA adopts the following policy.

- I. Co-sponsorship shall be limited to non-profit organizations whose practices and policies are consistent with the mission of the CBA. However, the CLE Advisory Committee shall have the authority to approve co-sponsorship with for-profit organizations whose practices and policies are consistent with the CBA's mission statement.
- II. All requests for co-sponsorship shall be made in writing and shall be delivered to the CLE Director of the CBA at least six months prior to the proposed program date. This period may be shortened at the discretion of the CBA's CLE Director. Each request shall include the name of the potential co-sponsor; the subject matter to be covered; the projected date and time of the seminar; the program topic(s); the names of speakers, if known; the anticipated division of responsibilities for the seminar, including financial; and a proposed budget.

Upon receipt of request, the CLE Director shall determine if the proposed seminar overlaps with the area of responsibility of a member committee of the CBA. If such overlap exists:

- A. The CLE Director shall forward all information regarding the request to the chair of the member committee concerned, who shall bring the co-sponsorship question before the members of the committee to determine if there is sufficient interest within the committee to warrant co-sponsorship. If the committee does not have such interest, it is expected that the CBA will decline co-sponsorship.
 - B. If the member committee has an interest in co-sponsoring the seminar, the co-sponsorship application shall be brought before the CLE Advisory Committee, which shall consider the educational value to attorneys, inter-professional relationships, the existing CBA curriculum, timing of the seminar, development and financial obligations, and staffing requirements for the seminar in making a decision on recommending co-sponsorship.
 - C. The request shall require the approval of the CLE Advisory Committee and the Executive Director of the CBA and the Executive Director of the CBA.
 - D. If there is no overlapping member committee, the request should be referred to the CLE Advisory Committee as outlined above.
- III. The CBA shall exercise control of the planning and administration of a co-sponsored program.

- IV. Registration fees for a co-sponsored seminar shall be consistent with current pricing for CBA seminars for CBA members and non-members. The price for a seminar may be discounted to CBA members.

The CBA shall share equally in profits for a co-sponsored seminar after payment of direct out-of-pocket expenses. If each sponsor contributes an equal amount of staff time and volunteer effort to the project, the CBA shall waive reimbursement of its overhead contribution. However, if the CBA is required to bear a majority or more of the staff time and effort involved in conducting the seminar, the CBA shall be reimbursed for its overhead utilized in planning and conducting the seminar.

If the program shows a loss, the CBA shall, at a minimum, receive payment of all out-of-pocket expenses, unless otherwise agreed by the CLE Advisory Committee for good-cause shown by a non-profit co-sponsor.

- V. The CBA reserves the right to own solely or jointly the copyright for the written materials for a co-sponsored program.
- VI. This policy shall not preclude the CBA CLE staff from contracting for the services of experts when deemed appropriate to provide programs.
- VII. This policy shall not prevent the CBA CLE staff from listing an organization on promotional materials for a seminar if necessary to receive continuing education credit for another profession or marketing support for a fully sponsored program, provided that such listing enhances the educational value of the seminar and inter-professional relationships.
- VIII. Where a co-sponsorship request is approved, a representative from the co-sponsoring organization shall execute a CBA CLE Co-Sponsorship Agreement acknowledging the terms of the co-sponsorship and their assent to the terms of the CBA's co-sponsorship and CLE policies.
- IX. This policy shall not affect the existing arrangements the CBA has with the following organizations: Greater Cincinnati Minority Counsel Program (Annual Meeting), Federal Bar Association, GE Aviation, Hamilton County Municipal Court (Annual Judges Program), Midwest Regional Bankruptcy Seminar, Potter Stewart Inn of Court, Volunteer Lawyers for the Poor, and the Cleveland Intellectual Property Law Associations.

Approved by the Cincinnati Bar Association Board of Trustees on January 25, 2012.

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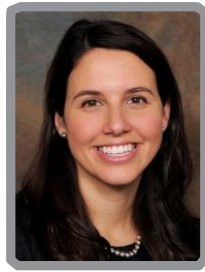
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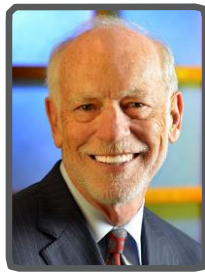
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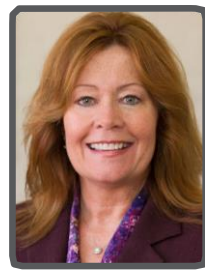
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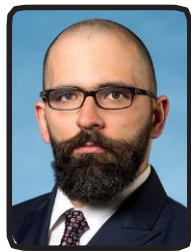
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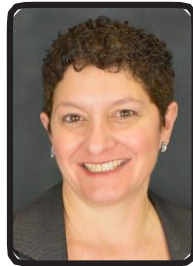
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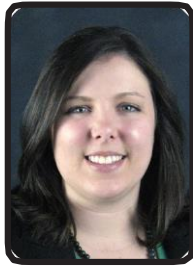
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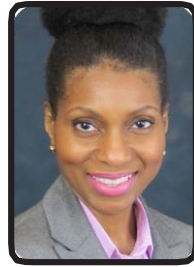
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