WELCOME!

Section Orientation

November 18, 2019
Overview

Today’s Agenda
Orientation Folders
Compliance Checklist
Key Dates
michbar.org
Welcome

Dennis Barnes,
SBM President

Janet Welch,
SBM Executive Director

Aaron Burrell,
SBM Representative Assembly Chair
Introductions

Your Name, Section, Title, then ...

Choose Two:

1) A feature of my section of which I am particularly proud
2) A challenge my section is currently facing
3) A question I’d like answered during today’s orientation
Section
Events
Darin Day
Heather Anderson
Key Points to Remember

• Submit all your known section events for the year, at the beginning of the year.

• Start with Heather Anderson – every time.

• Need online registration? Contact SBM at least 12 weeks prior to event date.

• Every contract must be reviewed by the SBM’s Office of General Counsel.

• Decide up-front whether to use a post-event survey.

• For each event, start early and allow plenty of lead time.
Your Year in Section Events

To kick-off the bar year, please provide the following information ASAP:

- Your Section name and a primary event contact
- All your event dates (or rough approximates)
- For each event:
  - Event Name (or approximate)
  - City and Venue (or best guess)
  - Event Type: educational, networking, charity, awards and recognition?
  - Will you need SBM staff assistance?
Available SBM Staff Support for Section Events:

- Setting up Online Registration
- Approving Contracts (required)
- Publicizing and Promoting Events
- Duplicating and Distributing Materials for Educational Seminars
- Post-Event Surveys
- Onsite Staff Support (Day of Event)
- Event Finances
Getting Started …

- As soon as you are considering a date for any section event, please contact Heather Anderson.

- Review the Event Planning Steps and Responsibilities Table (pages 4-5).

- Review the Event Information Minimum Due Dates Table (page 6).
Seminar and Events Checklists

See Page 8
Heather Anderson
Contracts for Events

• In all contracts, list the contracting party as: [Name of Section] of the State Bar of Michigan.

• Submit all section contracts as early as possible to contractreview@michbar.org for review and approval by the SBM Office of General Counsel.

• Allow five (5) business days for SBM review and approval, absent extenuating circumstances, but include in the body of the e-mail the date the contract is needed.

Send questions to contractreview@michbar.org or contact Nkrumah Johnson-Wynn at 517-346-6310
Do think about the information you want to collect. What do you want to know?

Don’t worry about formatting the survey with check boxes or ratings scales: SBM Staff will handle survey design.

Do remember people are busy: attendees should spend no more than a minute or two completing a survey.

Don’t forget to promote your survey! Print the link on event materials, share it on screen, announce it from the podium. Send your survey to attendees by email and post a link to your SBM Connect website.

Do send the survey by email before attendees even leave the venue to increase response rates and ensure fresher comments.

Contact Michelle Erskine at merskine@michbar.org
Event Finances

• Sections are exempt from sales tax and covered under SBM’s liability insurance. Ask for certificates!

• For event services provided by SBM staff, time is charged at $25/hour, other fees are listed in the event planning forms.

• If you want a credit card option for event registration, please provide 12 weeks notice. If accepting checks, they MUST be delivered with a check transmittal form within THREE DAYS.

• SBM will provide accounting for your event in the first week of the month following the month in which you submit the final invoice.
SBM Staff Contacts for Events

See Back Page of Section Events Planning Handbook
Communications Services
Available from SBM Staff

Sue Oudsema
Andrew Marks
Vary Your Voice: Use Communications to Get Ahead

Vivid Visibility: Say It Loud & Clear

Make Sure Your Online Member Directory Profile is up-to-date
Features

• **Council Information**—council roster, bylaws, section demographics, council, committee, and section meeting minutes

• **Discussion Group** with daily digests sent by email—replace your section’s listserv

• **Library**—share agendas, newsletters, reports, other documents

• **Event Calendar**—seminars, events, and meeting dates

• **Section Member Directory**

• **Seminar Materials**—visible to registrants only

Contact: Andrew Marks
ALTERNATIVE DISPUTE RESOLUTION SECTION

Mission
The mission of the Alternative Dispute Resolution Section is to encourage conflict resolution by:
1. Providing training and education for ADR professionals;
2. Giving professionals the tools to empower people in conflict to create optimal resolutions;
3. Promoting diversity and inclusion in the training, development, and selection of ADR providers and encouraging the elimination of mediator bias; and,
4. Advancing the use of alternative dispute resolution processes in our courts, government, businesses, and communities.

Who We Are
The ADR Section is made up of individuals interested in conflict resolution, peacemaking, and improving the climate in Michigan for mediation, arbitration, and other forms of ADR. We include lawyers, law students, and non-lawyers. Joining the ADR Section places you in the forefront of a movement dedicated to providing better representation of the public through improvement of ADR practices and techniques.

Why You Should Join the ADR Section
Network and learn from top practitioners:
• Statewide networking events and outstanding training and skill building opportunities
• Regional mediator forums—where mediators share and learn from each other
• Annual meeting—offering 8 hours of SCAO-approved advanced mediator training

Find Us On

Full Council Meetings
• Friday, August 9, 2019
• Friday, October 11, 2019
• Friday, December 13, 2019
• Friday, February 14, 2020
• Friday, April 17, 2020
• Friday, June 12, 2020
• Friday, August 14, 2020
• Saturday, October 17, 2020

All meetings convene at 9:30 a.m., on Friday mornings at the SBM building in Lansing.

Executive Committee Teleconferences
SBM Connect Discussion Groups

The discussion group can replace your listserv.

- Offered at no cost to sections
- Membership status updated in real time
- No need to login! Participate by email only
- Self moderated
- Frequency: Daily Digest, Real Time, None
- Discussion attachments (PDF, Word, etc.) are archived in the Library
- Members must publicly share their email addresses
Luncheon with the Michigan Tax Tribunal

The Admin Law Section invites the Government Law, Taxation, and Young Lawyers Sections to this informative discussion with the Tax Tribunal.

Date: Wednesday, December 11, 2019
Time: 11:45 a.m.–2:00 p.m.
Location: Kellogg Hotel & Conference Center, Michigan State University, 219 S Harrison Ave, Room Big Ten C, East Lansing
Cost: $25 for members of the Admin & Reg, Government Law, Taxation, and Young Lawyers Sections; $40 for non-section members; $15 for law students (includes lunch and parking)

Register: online or by mail form
To help ensure an accurate lunch count, registrations must be received no later than December 5, 2019.

The Admin Law Section will be hosting a luncheon with the Michigan Tax Tribunal that includes a moderated panel discussion to gain the expertise, experience, and perspective from not only Tax Tribunal members, but from the perspective of being an attorney, assessor, or appraiser involved in matters before the Tribunal as well.

The panel will be addressing the topics and questions that you have about practicing before the Tribunal. Submit your topics or questions that you want answered by the panel to Chris Patterson at cpatterson@fsbrlaw.com. Admin Law Section members can submit questions through the Section's SBM Connect page.
Print & Electronic Publications

Bar Journal Section Briefs
Significant developments in the law, noteworthy events or achievements.
Due on the 5th of the month/75 word limit.

Theme Issues
Work with theme editor from the Bar Journal Committee.
Scheduled 1-2 years in advance.

Contact: Linda Novak
Electronic Publications are Mobile Friendly

- Formatted for your tablets & smartphones
- All devices accessed through the same link
- If you want to set up your Section publication in digital format, contact Susan Oudsema.
Print & Electronic Publications

In-House
Typesetting & Design/Print Services

- Provide assistance with section print directories, brochures, newsletters, and agenda packets.
- Currently produce 20 section/local bar newsletters internally.
Electronic Newsletters

- Provide assistance with building Section e-newsletters.
- E-newsletters are either replacing or supplementing print publications.

Contact: Andrew Marks
E-Newsletter Option #1

Include “teaser” snippets of each article in e-blast and link to traditional PDF newsletter.
E-Newsletter Option #2

Include all of the publication content in the e-blast. Full articles and supplements are included in one message.
E-Newsletter Option #3: SBM Connect Landing Page

Entire issue displayed on a landing page with snippets of each article, a photo, and a link to read the full article.
Landing Page

Newsletters

- Can be password protected
- Categories list become the topic index
- Top navigation is the issue index
Print & Electronic Publications

Fees for E-blasts & E-newsletters

Staff will create and send e-blasts to Section membership. Optimized viewing on all devices.

- $100 for standard e-blast
- $165 for e-newsletter with full or partial articles included
Design Standards & Promotional Items

Correct use of the State Bar logo and seal

LOGOTYPE: SECTIONS AND DIVISIONS

When a section or division share identity with the Bar on an official State Bar product or publication, the SBM logo should be included prominently and the identity of the section or division shall be done typographically. No other logos may be used. Examples of how this is to be done are shown as the right.

Proportionally the title of the division or section shall be one half to one third the size of the SBM logo. The title of the division or section shall be set in all caps using Futura Book, Helvetica Regular, or Arial. No other typeface is acceptable.

When the division or section title is staged at the side of the SBM logo, a .5pt vertical rule, the height of the logo shall be used to separate the logo and the title.

Link
Social Media

Sections with Social Media Sites

- Administrative & Regulatory Law Section
- Agricultural Law Section
- Alternative Dispute Resolution Section
- American Indian Law Section
- Antitrust, Franchising & Trade Regulation Section
- Arts, Communications, Entertainment & Sports Section
- Aviation Law Section
- Business Law Section
- Environmental Law Section
- Information Technology Law Section
- International Law Section
- Labor and Employment Law Section
- Law Students Section
- Litigation Section
- Paralegal/Legal Assistant Section
- Prisons & Corrections Section
- Real Property Law Section
- Solo and Small Firm Section
- Young Lawyers Section

ACES Facebook Page
Media Relations

- Assist Sections with news releases.
- Provide consultation re media relations.
- Refer reporters to Section officers.
- Will help with publicity for events.
- When requesting a press release, please give four weeks notice before your event.
Media Relations

- SBM President is primary spokesperson for the Bar.
- If Section has no position, experts from within the Section may comment as individuals.
- Be careful not to attribute statements to the State Bar or the Section if you are representing a personal point of view.
Deadlines

We do our best to meet your deadlines.
Whenever possible, please allow:

Website Updates
3-4 days

E-blasts & Surveys
2-5 days (depending on complexity)

Publications/Newsletters
2 weeks

News Releases
4 weeks before event

The more time you can give us, the better job we can do for you!
Demographics and Diversity

Anne Vrooman
Historic And Current Membership of the State Bar, 2019

Total Historic Membership is 66,888

ACTIVE MEMBER ATA, 42502, 63%

WITHDRAWN, 1779, 3%

VOL INACTIVE ATVI, 1138, 2%

STATUS UNKNOWN ATU, 2070, 3%

SPECIAL CERT EXPIRED ATSC, 51, 0%

REVOKED ATR, 591, 1%

DISC & N.P. ATNS, 97, 0%

N.P. ATN, 6281, 9%

EMERITUS ATE, 2417, 4%

SUSPENDED ATDS, 438, 1%

DISC INACTIVE, 22, 0%

ATTY DIS COURT COSTS ATDC, 17, 0%

DECEASED ATX, 9484, 14%

STATUS UNKNOWN ATU, 2070, 3%

SPECIAL CERT EXPIRED ATSC, 51, 0%

REVOKED ATR, 591, 1%

DISC & N.P. ATNS, 97, 0%

N.P. ATN, 6281, 9%

EMERITUS ATE, 2417, 4%

SUSPENDED ATDS, 438, 1%

DISC INACTIVE, 22, 0%

ATTY DIS COURT COSTS ATDC, 17, 0%

DECEASED ATX, 9484, 14%
Active Michigan Residents by Gender, 2019

FEMALE, 12,407, 35.1%

MALE, 22,930, 64.9%
All Members Joining the Bar by Gender 1987-2018
Active Michigan Residents by Generation, 2019

- **TRADITIONALISTS**
  - Pre 1944, 2088, 5.9%

- **BOOMERS**
  - 1944-1960, 12131, 34.3%

- **GEN X**
  - 1961-1980, 14009, 39.6%

- **MILLENNIALS**
  - 1981 and after, 7132, 20.2%
Race/Ethnicity of Active Michigan Members 2019
(Excludes No Answer and Prefer Not to Answer)

- **AMERICAN INDIAN,** 127, 0.5%
- **ASIAN-PACIFIC ISLANDER,** 513, 2.1%
- **AFRICAN ORIGIN,** 1415, 5.7%
- **EUROPEAN,** 20263, 81.7%
- **HISPANIC-LATINO,** 413, 1.7%
- **MULTI-RACIAL,** 457, 1.8%
- **ARAB ORIGIN,** 542, 2.2%
- **OTHER ETHNIC ORIGIN,** 1079, 4.3%
- **AMERICAN INDIAN,** 127, 0.5%
- **ASIAN-PACIFIC ISLANDER,** 513, 2.1%
- **AFRICAN ORIGIN,** 1415, 5.7%
Active Michigan Residents By Occupational Area, 2019

- Private Practice, 17446, 49.3%
- Corporate Counsel, 3327, 9.4%
- Government, 3173, 9.0%
- Government Relations, 113, 0.3%
- Judiciary, 1195, 3.4%
- Legal Services, 2273, 6.4%
- Law School, 115, 0.3%
- Military, 46, 0.1%
- Non-Law Related, 1589, 4.5%
- Not Employed: Not Seeking Employment, 725, 2.1%
- Not Employed: Seeking Employment, 304, 0.9%
- Nonprofit Organization, 522, 1.5%
- Other, 1201, 3.4%
- Retired, 1942, 5.5%
- Not Reported, 900, 2.5%
Active Michigan Residents in Private Practice by Firm Size, 2019

- Not Reported, 194, 1.1%
- Very Large 100+, 2245, 12.9%
- Large 21-99, 2104, 12.1%
- Medium 11-20, 1088, 6.2%
- Small 2-10, 5406, 31.0%
- Solo Full Time, 4068, 23.3%
- Solo Part Time, 2341, 13.4%
Active Michigan Residents by Gender Joining the Bar 2009-2019

MALE, 4,831, 55.5%

FEMALE, 3,872, 44.5%
Active Michigan Members by Race/Ethnicity Joining the Bar 2009-2019 (excludes no answer and prefer not to answer)

- European, 3218, 67.4%
- African Origin, 256, 5.4%
- Asian-Pacific Islander, 233, 4.9%
- American Indian, 39, 0.8%
- Arab Origin, 271, 5.7%
- Other Ethnic Origin, 425, 8.9%
- Hispanic-Latino, 179, 3.7%
- Multi-Racial, 156, 3.3%
Diversity and Inclusion

We hold annual programs like Brunch for Bars and The Affinity Bar Summit as well as ad hoc opportunities for training and education and professional development.

Collaboration opportunities available for sections:
- Inclusion trainings and resources
- Community activities focused on diverse populations
- Mentoring and civic education programs

Does your section want to be more involved in improving the diversity and inclusion of the profession? Do you have a Diversity committee?

Feel free to email us at merskine@michbar.org for collaboration opportunities

Visit the SBM website tab “Diversity and Inclusion” for more information and resources.
Public Policy and More

Peter Cunningham
Section Public Policy

- Sections shape public policy affecting their practice areas.

- Sections are vital to ensuring SBM adopts thoughtful and well-informed public policy positions.

- Sections and SBM can partner to achieve shared public policy goals.
What Is Public Policy?

• Legislation
• Court Rule Amendments
• Amicus Briefs
• Administrative Regulations
• ABA Resolutions
• University Policies
Limits on Section Public Policy

Sections funded by voluntary dues may engage in public policy as long they follow the procedures set forth in:

– Section Bylaws

– SBM Bylaws

– Administrative Order 2004-01
Section Bylaws

• Review your section bylaws on adopting positions.

• Follow procedures for notifying members and voting.
State Bar of Michigan Bylaws

• Section must report position to SBM **within 10 days** of adopting a position.

• Use web-based form at [michbar.org/publicpolicy/report_public](http://michbar.org/publicpolicy/report_public)

• Must include a copy of the report, recommendation, amicus brief, or other written declaration of the policy.

• Section may not advocate a position that is “inconsistent” with a SBM position.
In *Keller v. State Bar of California* (1990) the U.S. Supreme Court held that mandatory bars could only engage in activities that are germane to either regulating the legal profession or improving the quality of legal services.
Section Tips on Keller

• Court rules are always considered Keller-permissible.
  – Important to meet SBM deadline not Court deadline.

• SBM staff refers relevant legislation to sections if is possibly Keller-permissible.
  – Important to meet deadlines for Board consideration.
Section advocacy and
Administrative Order 2004-1

• When engaging in ideological advocacy, section must include a coversheet that includes the following information:
  – that the section is not the State Bar of Michigan but rather a section whose membership is voluntary,
  – that the position expressed is that of the section only, and that the State Bar has no position on the matter, or, if the State Bar has a position on the matter, what that position is,
  – the total membership of the section,
  – the process used by the section to take an ideological position,
  – the number of members in the decision-making body, and
  – the number who voted in favor and opposed to the position.

• If the section position is communicated orally, this information must also be communicated orally.
Section Public Policy Procedure

• Make sure public policy item is within jurisdiction of section.

• Take position in accordance with section bylaws.

• Report public policy position to SBM within 10 days.
  – michbar.org/publicpolicy/report_public

• SBM provides required coversheet to include with advocacy. Section cannot advocate until that coversheet is received.
Public policy Resources

• SBM Webpage – Public Policy Resource Center
  – michbar.org/publicpolicy
  – Report public policy positions at michbar.org/publicpolicy/report_public

• Newsletter – Public Policy Update
  – Sign up at michbar.org/publications/subscription
Public Policy Contacts

Peter Cunningham
pcunningham@michbar.org
517-346-6325

Carrie Sharlow
csharlow@michbar.org
517-346-6317
Finance Overview

James Horsch
Stay on Top of the Finances

Section Financial Services and Key Policies; Section Treasurer Orientation

- James C. Horsch, Division Director of Finance and Administration
Stay on Top of the Finances

SBM Finance Team and Services Provided to Sections

Becky Weaver, Financial Services Manager – financial reports, chart of accounts, and main section contact.

Alpa Patel, Accounts Payable Specialist – accounts payable, pay bills, process expense reimbursements.

Amanda Segar, Fee Processing Specialist – processes section fee payments.

Tina Bellinger, Finance Specialist – processes your section meeting and seminar registrations and payments, and orders for publications.

Jim Horsch, Director of Finance & Administration – overall responsibility for annual audit, accounting, financial reporting, cash and investments, and financial management.
Stay on Top of the Finances

Key Financial Policies and Issues

- SBM and the State of Michigan, and tax exemption.
- Section Investment Earnings.
- Section Fund Balance Policy and Strategic use of Reserves.
- Section Treasurer Orientation Conference Calls:
  - November 6, 2019, 2:00 p.m.
  - November 7, 2019, 10:00 a.m.
Section FAQ

Darin Day
What are best practices to strengthen section membership?  

FAQ #1

1) Keep your **SBM Connect website** current, and communicate often.  
   – SBM Connect Discussion Group, e-blasts, newsletters

2) Understand and articulate your section’s **value proposition**.

3) Provide **substantive education** programs and fun networking opportunities; consider inviting non-lawyers to your events.

4) Develop, promote, and encourage **mentoring opportunities** – especially “young” mentors for “young” attorneys.

5) Partner and collaborate with **other sections, affinity bars, etc**.

6) **Develop Leadership**: educate current leaders, encourage new leaders, be deliberate about year-to-year transitions.
Changing our Section’s Name, Dues, or Bylaws
FAQ #4

1) All changes require approval by the Board of Commissioners.

2) First – contact Darin Day.

3) Understand and follow the amendment procedures set forth in your section’s current bylaws.

4) Clearly document all the steps: notice, quorum, votes, etc.

5) Submit all documentation to Heather Anderson.

6) Any changes in dues must be approved no later than the July BOC Meeting for implementation in October of the same calendar year.
Wrap-up

Q&A

Final Thoughts

THANK YOU!