

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



Post-Event Feedback Surveys

- ✓ **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

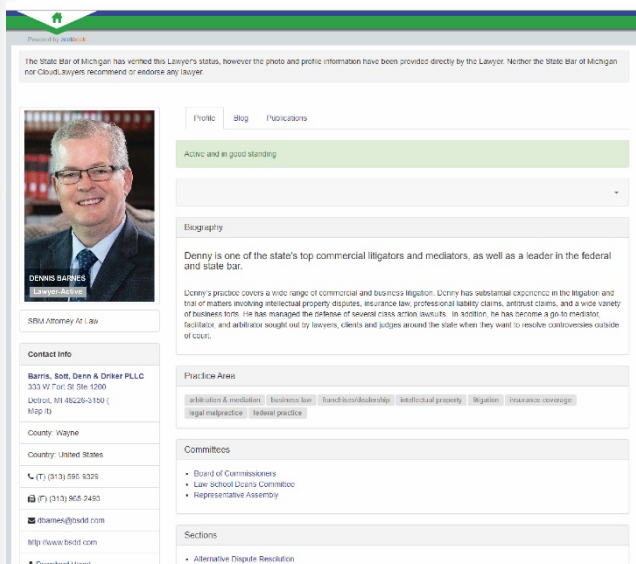
Sue Oudsema
Andrew Marks



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

[ADR Home](#)[Council](#)[Public Policy](#)[Events](#)[Awards](#)[Journal](#)[Reports](#)[Resources](#)[My Profile](#)

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



Member-Only Content

[Section Discussions](#)[Section Events](#)[Section Library](#)[Section Member List](#)

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.



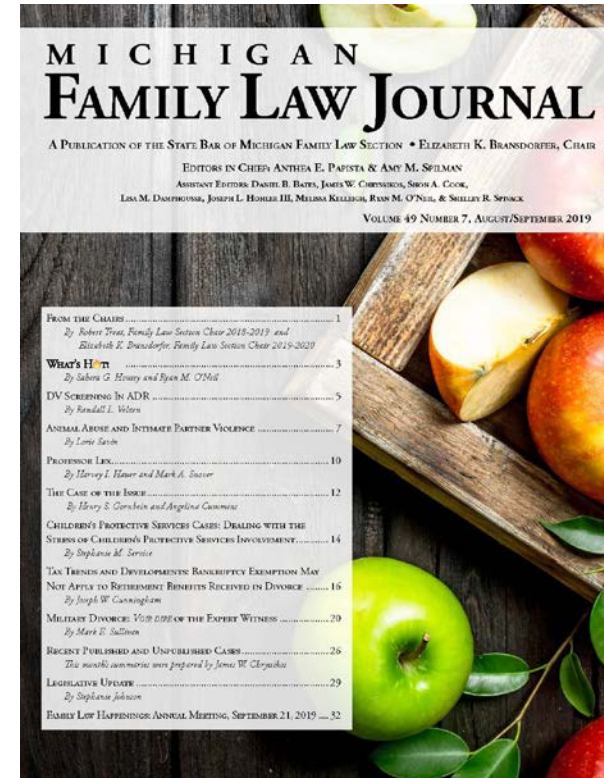
Contact:
Sue Oudsema



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.



SBM Real Property Law Section
e-Newsletter

Current Issue 2019 2018 2017 2016 2015 Archive Submit an Article RPLS Website search

September 2019

An informative e-newsletter for the Real Property Law Section of the State Bar of Michigan.

Proposed MZEA Amendments for Short-Term Rentals

By Mariah Agoro, Bodman PLC

Short-term rentals of residential properties for vacation use have increased dramatically, so has the controversy surrounding their operations. Resort communities love them, but neighbors often complain about noise, overflow parking, and loss of peace and quiet. For more background information see Joseph A. Doerr, *Regulating Short-Term Vacation Rentals in Michigan Using Existing Remedies and New Legislation*, 45 Nos. 1-2 Mich. Real Prop. Rev. 16, 16-22 (Spring & Summer 2018). Some municipalities have outright banned short-term rentals under zoning ordinances while real estate brokers strongly favor liberal short-term rental policies.

[Read More or Comment](#)

Only "Borrower" Can Sue Under RESPA

By Howard Lax, Bodman PLC

In *Keen v. Helson and Owen Loan Servicing, LLC* (CA6 No. 19-6035, July 18, 2019), the U.S. Sixth Circuit Court of Appeals held that only the persons signing a mortgage note have a right to sue for Real Estate Settlement Procedures Act (RESPA) violations under federal law. RESPA grants a private right of action to borrowers, but the statute does not define "borrower." The court held that a borrower is the person who signs a note and directly receives the loan proceeds. Other loan beneficiaries do not have a right to sue the lender or loan servicer for violations of RESPA consumer protections. Hence, a spouse who signs the mortgage to release dower and/or homestead rights does not have the right to sue a loan servicer for violation of borrower protection requirements (12 CFR §§ 1024.30 to 1024.41), even when the spouse makes payments after the borrower dies. The court suggested that Keen might pursue her claims in state court under state consumer protection laws.

[Read More or Comment](#)

Legislative Report

[View the Report](#)

Categories

- All Articles
- Artist Rights
- Condominium
- Construction
- Development
- Easements
- Landlord/Tenant
- Miscellaneous
- Mortgages & Foreclosures
- Property Rights
- Residential
- Restrictive Covenants
- Business Rights
- Taxes
- Title

Sign Up Today!

SBM Real Property Law Section
Real Estate Outlook 2020

Real Estate Outlook 2020
Thursday, October 17, 2019
Detroit Athletic Club, Detroit
7:30 a.m.—Breakfast
8:00–8:45 a.m.—Speaker: Robert A. Dye, Ph.D., Senior Vice President and Chief Economist, Comerica Bank
8:45–9:45 a.m.—Roundtable Discussion



Contact:
Andrew Marks

E-Newsletter Option #1

Include “teaser” snippets of each article in e-blast and link to traditional PDF newsletter.



The Michigan Dispute Resolution Journal

Summer 2019 | Volume 27 | No. 3

[View as a PDF](#) (save to your desktop for archiving or offline viewing)

[View the Journal Archive](#)

Annual Meeting & Conference

Date: October 11–12, 2019

Location: Inn at St. John's, 44045 Five Mile Rd, Plymouth

Register: [online](#) or by [mail form](#)

Registration deadline is October 7, 2019

Join us for the ADR Section's Annual Meeting & Conference starting on October 11. The conference has been approved for 11 hours of Advanced Mediation Training. Check out the [full schedule](#), and register today!

Sponsorships available. See the [sponsor registration form](#) for more details.



E-Newsletter Option #2

Include all of the
publication content
in the e-blast.

Full articles and
supplements are
included in one
message.



[View Online](#)



SBM *Michigan Environmental Law* Journal

Summer 2019, Vol. 37, No. 1, Issue 106

[View the full issue](#) or the [PDF](#).

Chair's Report From Kelly Martorano

I've said it before and I'll say it again, the Environmental Law Section has the best members! Seriously, I am so happy to have the members of this Section as my colleagues and I am constantly impressed by the good work that all of you do. So far, 2019 has been a great year for the Section and I want to tell you about all of the value this Section has to offer its members.




First, the Environmental Law Section provides timely and informative webinars to our membership. Over the past year, the Section has hosted webinars to update members about legislative changes at the end of 2018 and on the effects of dynamic Great Lakes shorelines on zoning and planning in Michigan's coastal communities. Second, the Environmental Law Section continues to organize and host excellent conferences. In April, the Section held its annual Air Conference in collaboration with the Michigan Manufacturer's Association. The Section, in collaboration with the East and West Michigan Chapters of the Air and Waste Management Association, will also present the Fall Joint Conference again in November. The Conference includes numerous presentations by EGLE Program Directors and staff. Finally, the Environmental Law Section publishes the *Michigan Environmental Law Journal* (MELJ), which provides members with quality articles on various key topics pertinent to environmental professionals in Michigan. The MELJ is an important resource that is available to the current and future members of the Section. [Read More](#)

What's Coming Up

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.



**MICHIGAN
REAL PROPERTY REVIEW**
Published by the Real Property Law Section State Bar of Michigan

Current IssueRecent Issues ▾ArchiveAboutSubmit an ArticleRPLS Website

search

Spring-Summer 2019

Volume 46, Nos. 1-2


FEATURE ARTICLES

Amendments to the Michigan Construction Lien Act: A Jumpstart to Priority for Design Professionals

By Aileen M. Leipprandt

On December 12, 2018, Public Act 367 of 2018 took effect, amending the Michigan Construction Lien Act ("Lien Act") by granting certain design professionals new priority rights where a project never actually gets built. Under the amended Lien Act, a design professional's lien can now relate back to the recording date of a statutory notice, well before and irrespective of when the design professional performed any services or whether any actual physical improvement to property actually occurs. In that respect, the revisions do away with longstanding Michigan jurisprudence that has strictly interpreted the Lien Act as fixing priority of all construction liens at the time of the first actual physical improvement to property.


[Read More or Comment](#)



Public Act 572 Amends Marketable Record Title Act Creating a Clash of Titans with Michigan Recording

By John D. Bartley

The Marketable Record Title Act ("MRTA") was enacted in 1945. The stated legislative purpose of MRTA is "simplifying and facilitating land title transactions by allowing persons dealing with the record title owner ... to rely on the record title covering a period of not more than 20 years for mineral interests and 40 years for other interests prior to the date of such dealing" In practice, marketable record title acts cause ancient interests in land to be extinguished by the passage of time if the holder of such interests fails to record a notice of claim in accordance with the applicable act.



COLUMNS

Chair's Report

By Nicholas P. Scavone Jr.

It has truly been an honor to serve as Chair of the Real Property Law Section over the last twelve months. I am humbled by the many prominent attorneys who have served in this position before me, and proud to serve the Section. RPLS has a long history of serving its members and the Michigan legal community, providing an extensive array of CLE programs, including our new program the RPLS Academy, social and networking events highlighted by our annual Summer Conference, and publishing our signature Michigan Real Property Review and more recently, our monthly E-News publication. During the last twelve months, we enjoyed successes and faced challenges, and we are in midst of what I believe is a significant transition driven by our membership.

[Read More or Comment](#)

Legislation Affecting Real Property

By Lorri B. King

The Section is active in the legislative process in a variety of ways, such as appearing before House and Senate committees, lobbying for and against bills, and monitoring legislation of interest to real estate lawyers. Before taking a formal public position for or against a bill, the Section follows procedures specified in its bylaws and members

Landing Page Newsletters

- Can be password protected
- Categories list become the topic index
- Top navigation is the issue index



The screenshot shows the website for the Michigan Environmental Law Journal. At the top, there is a navigation bar with links for Sections, Committees, Site Conduct, Contact Us, michbar.org, and a Profile Picture dropdown. The SBM logo is on the left, and the journal title "Michigan Environmental Law Journal" is prominently displayed in the center. Below the title is a green navigation bar with links for Current Issue, Recent Issues (selected), Archive, About, Contribute, and ELS Website. A search bar is on the right. The main content area features the "Summer 2019" issue (Vol. 37, No. 1, Issue 106) with a "Chair's Report From Kelly Martorano". The report text is on the left, and a photo of Kelly Martorano is on the right. To the right of the photo is a "Categories" list with links to various article types and topics. Below the report is a "What's Coming Up" section for events of interest. On the far right, there is a "Section Information" section with social media links and contact information for the Chair and Editor.

Sections | Committees | Site Conduct | Contact Us | michbar.org | Profile Picture

SBM
STATE BAR OF MICHIGAN

Michigan Environmental Law Journal

Current Issue | Recent Issues | Archive | About | Contribute | ELS Website

search

Summer 2019
Vol. 37, No. 1, Issue 106

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[Read Full Article](#)

What's Coming Up
Events of Interest to the Michigan Environmental Law Community

Categories

- [All Articles \(52\)](#)
- [Air Issues \(2\)](#)
- [Announcements](#)
- [Chair's Report](#)
- [Chemicals & Toxic Substances \(7\)](#)
- [Court Opinions \(10\)](#)
- [Editor's Letter](#)
- [Energy \(4\)](#)
- [Events](#)
- [Legislation \(10\)](#)
- [Viewpoint \(3\)](#)
- [Water Law \(6\)](#)

Section Information

[t](#) [in](#)

Chair
Kelly M. Martorano
kmartorano@dickinsonwright.com

Editor, Michigan Env. Law Journal
Amanda Urban

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

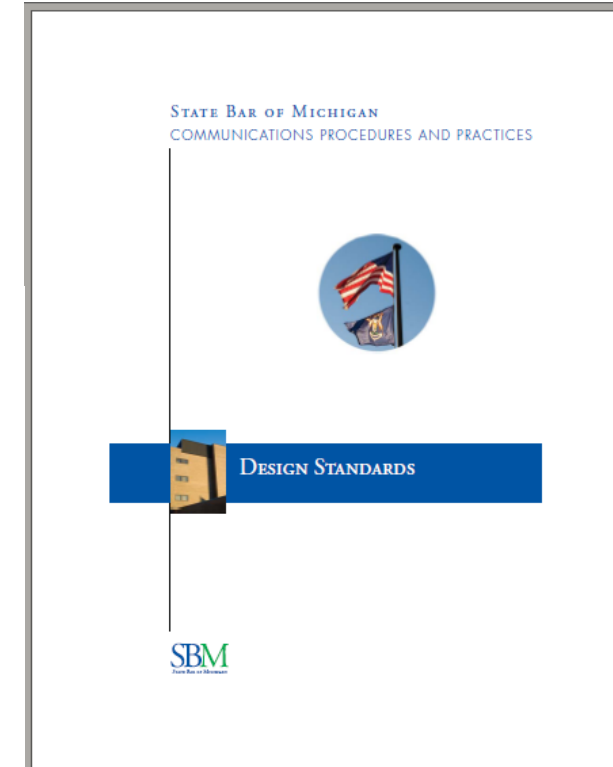
Correct use of the State Bar logo and seal

LOGOTYPE: SECTIONS AND DIVISIONS

When a section or division share identity with the Bar on an official State Bar product or publication, the SBM logotype will retain prominence 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 at the right.

Proportionally the title of the division or section shall be one half to one third the size of the SBM logotype. 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 logotype a .5pt vertical rule, the height of the logotype shall be used to separate the logotype and the title.



[Link](#)



ACES Facebook Page



- 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

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!

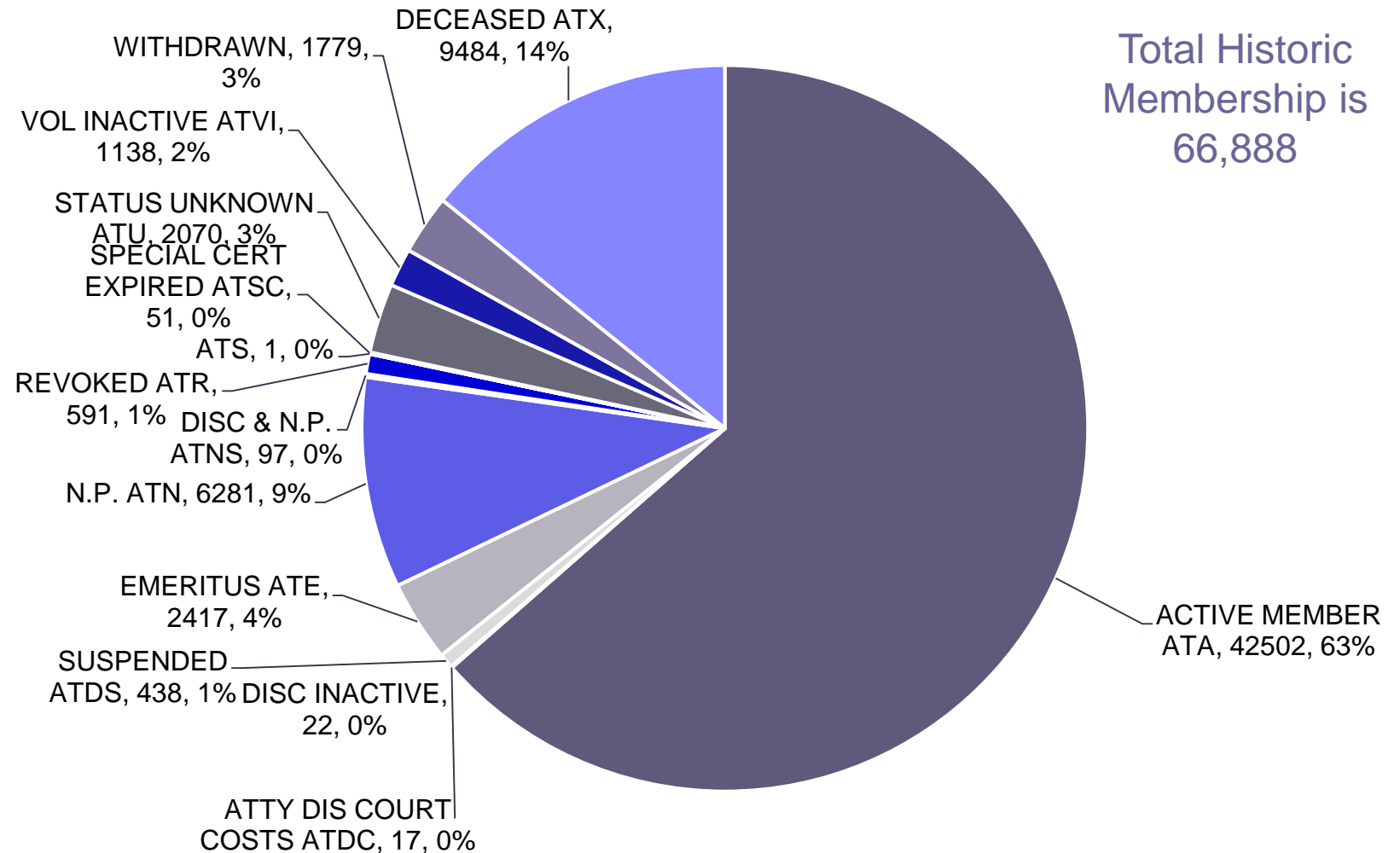


Demographics and Diversity

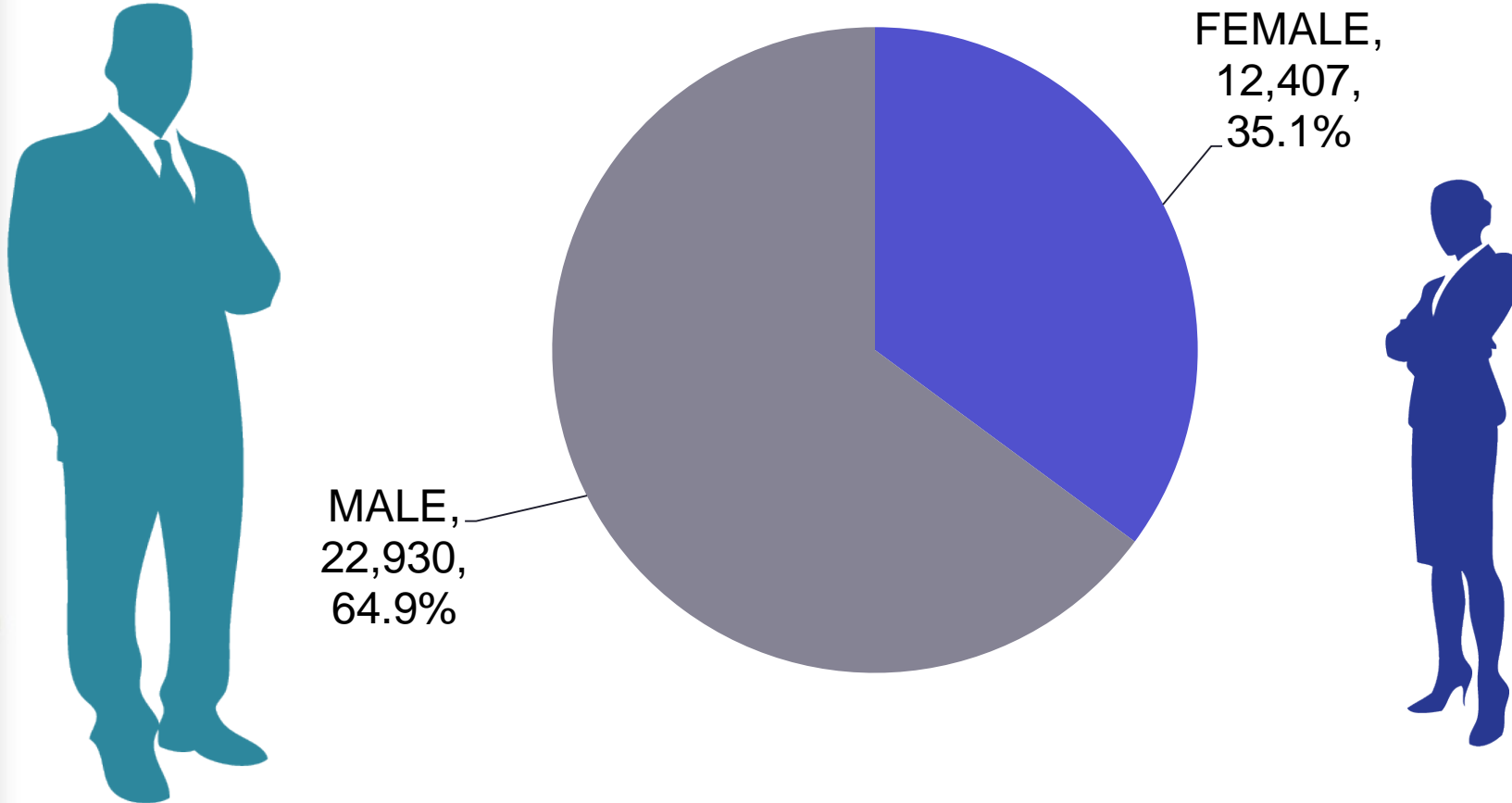
Anne Vrooman



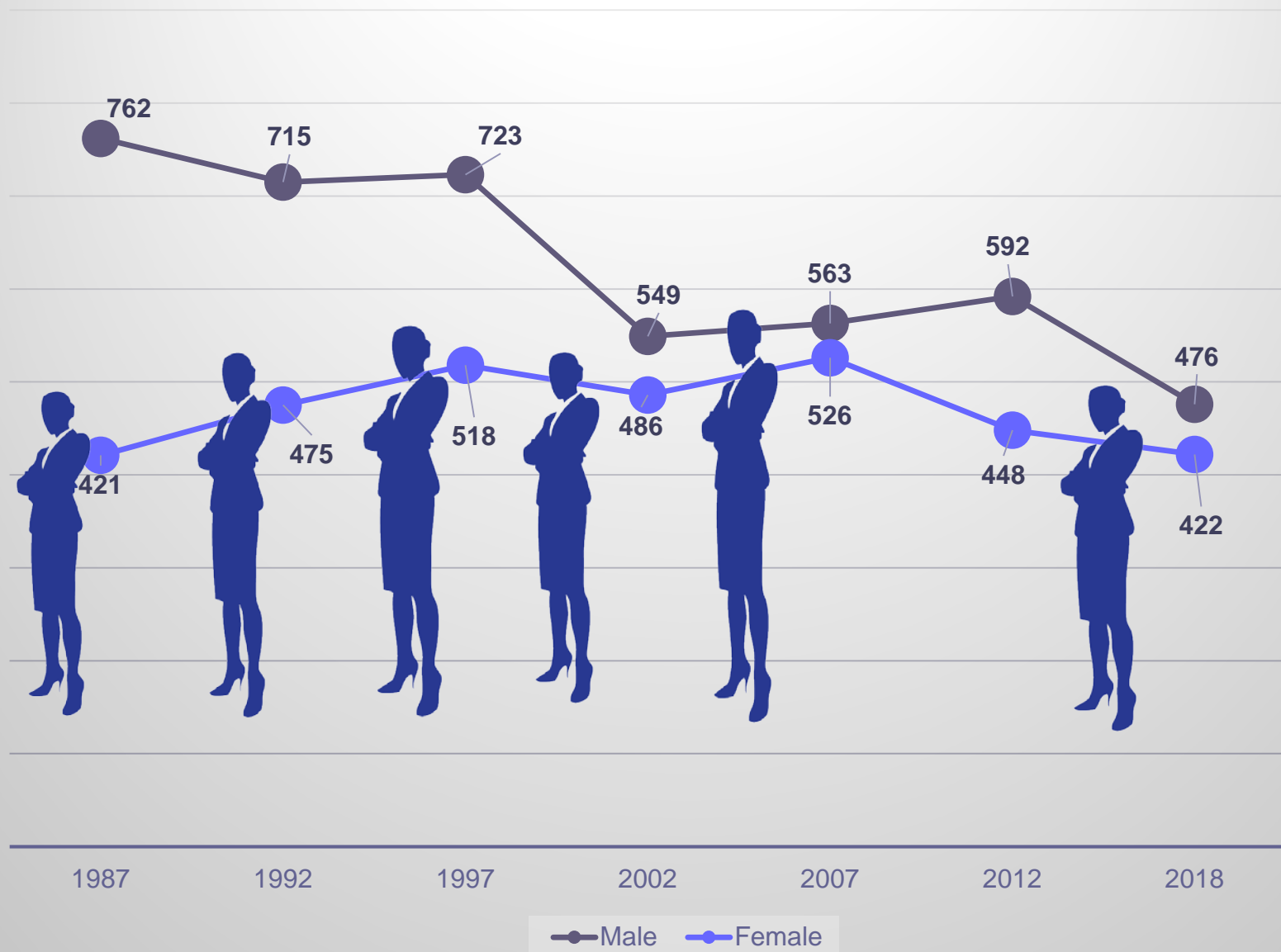
Historic And Current Membership of the State Bar, 2019



Active Michigan Residents by Gender, 2019



All Members Joining the Bar by Gender 1987-2018



Active Michigan Residents by Generation, 2019

MILLENNIALS 1981
and after, 7132,
20.2%



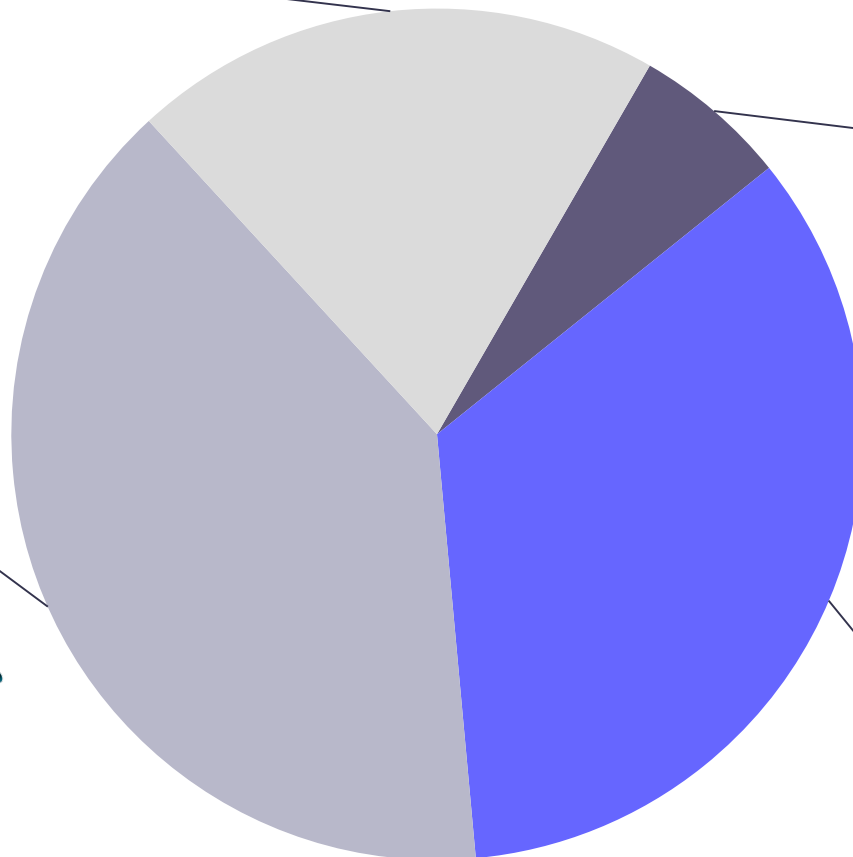
TRADITIONALISTS
PRE 1944, 2088, 5.9%



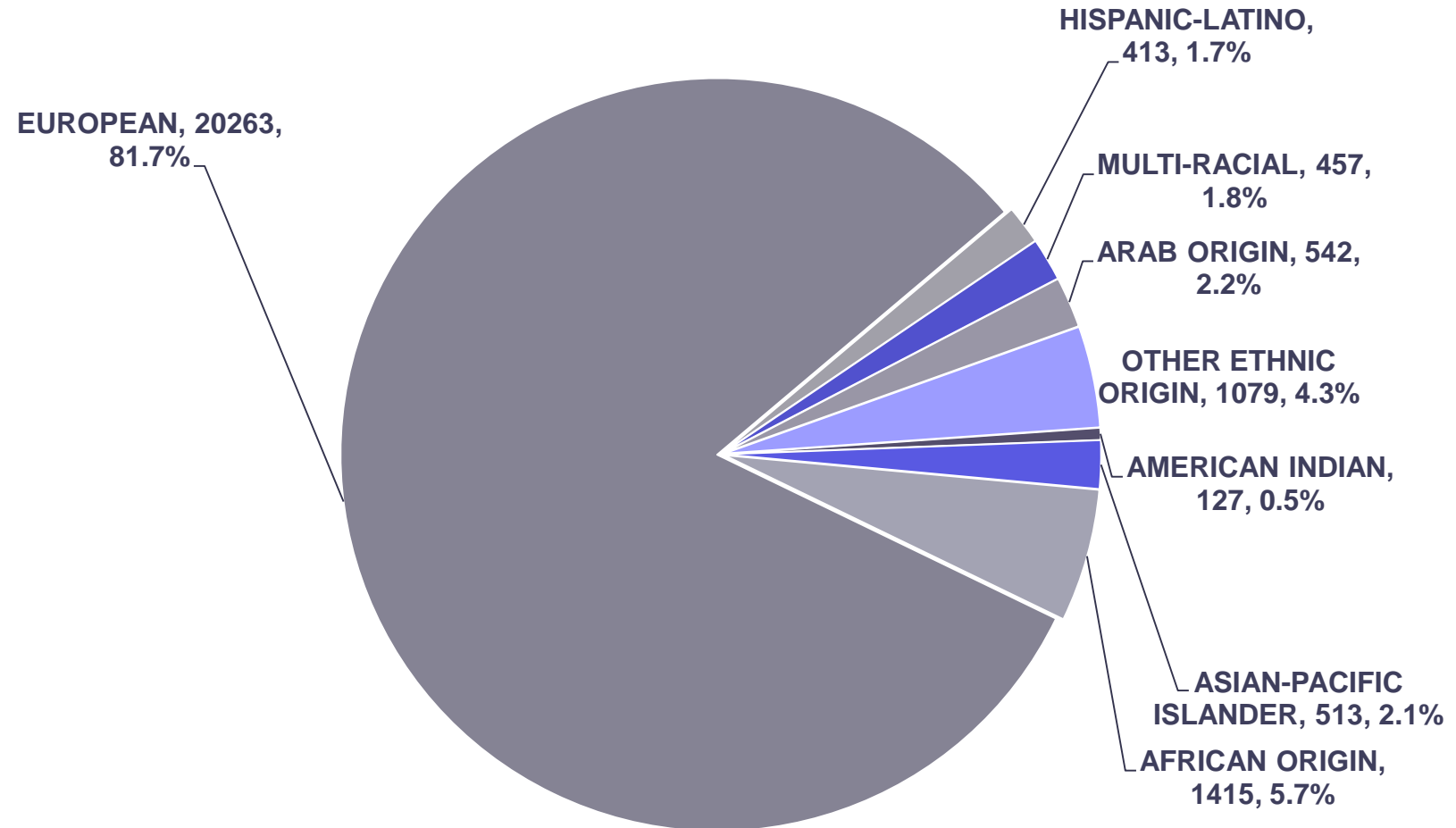
GEN X 1961-1980,
14009, 39.6%



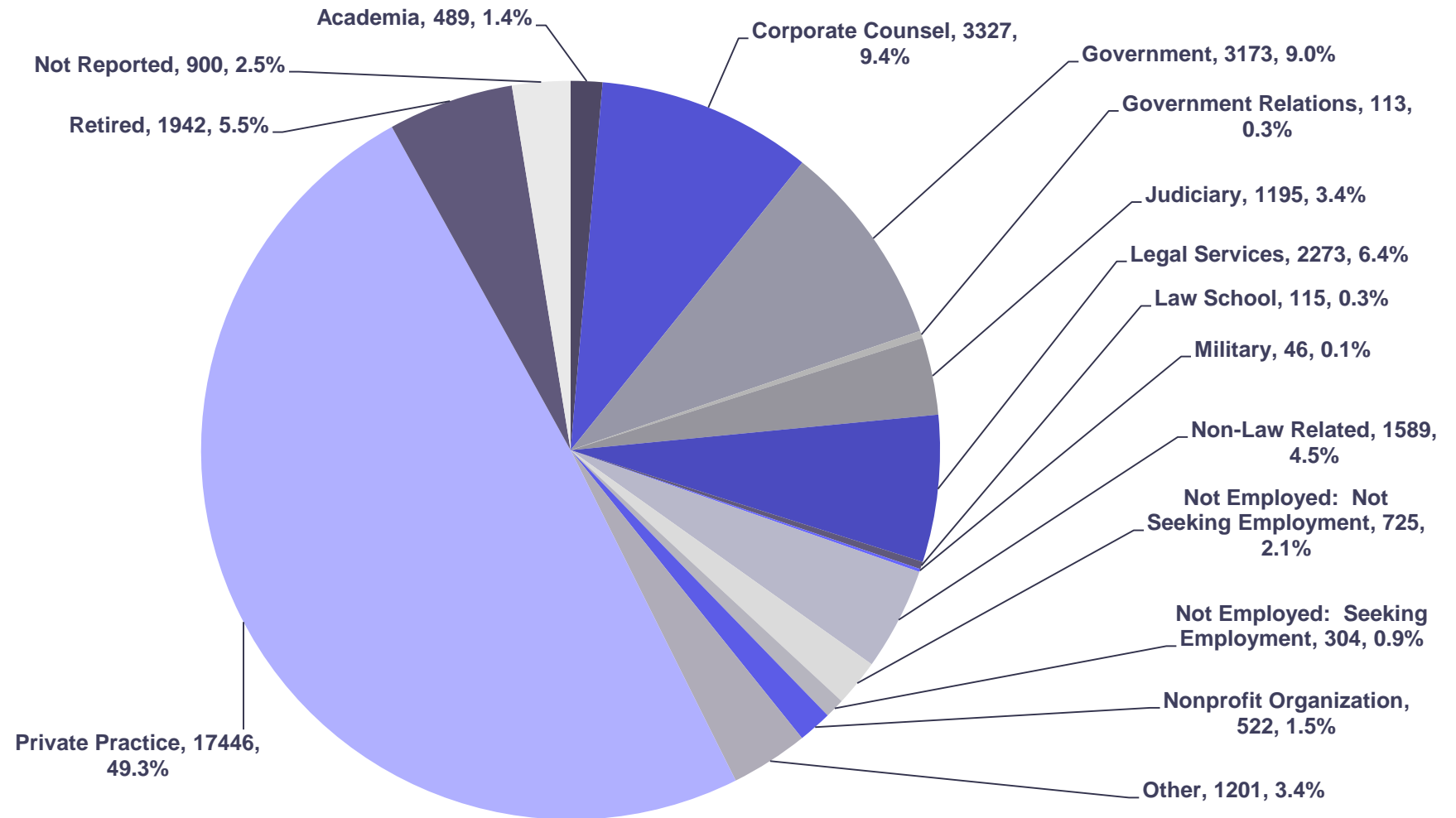
BOOMERS 1944-
1960, 12131, 34.3%



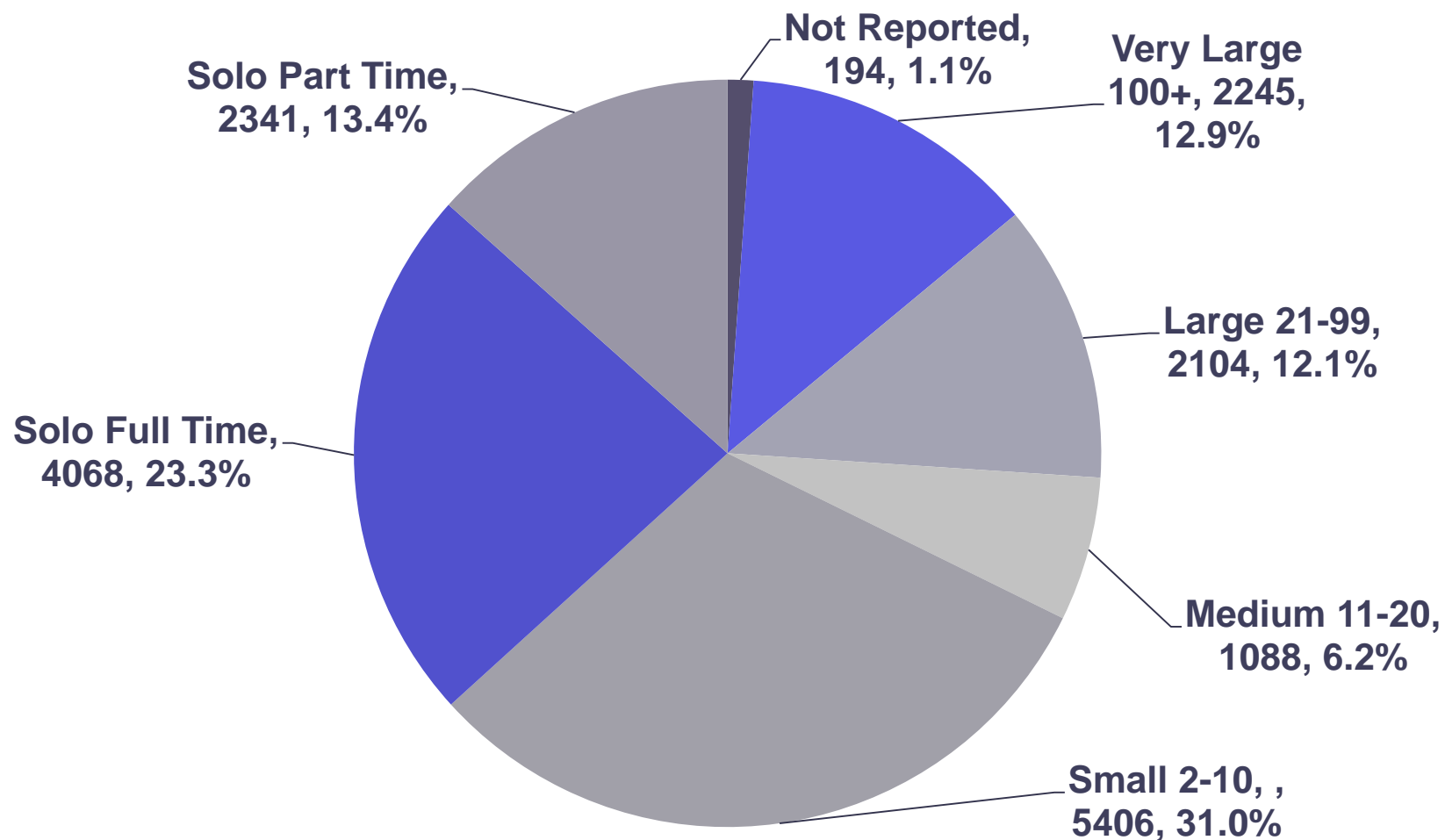
Race/Ethnicity of Active Michigan Members 2019 (Excludes No Answer and Prefer Not to Answer)



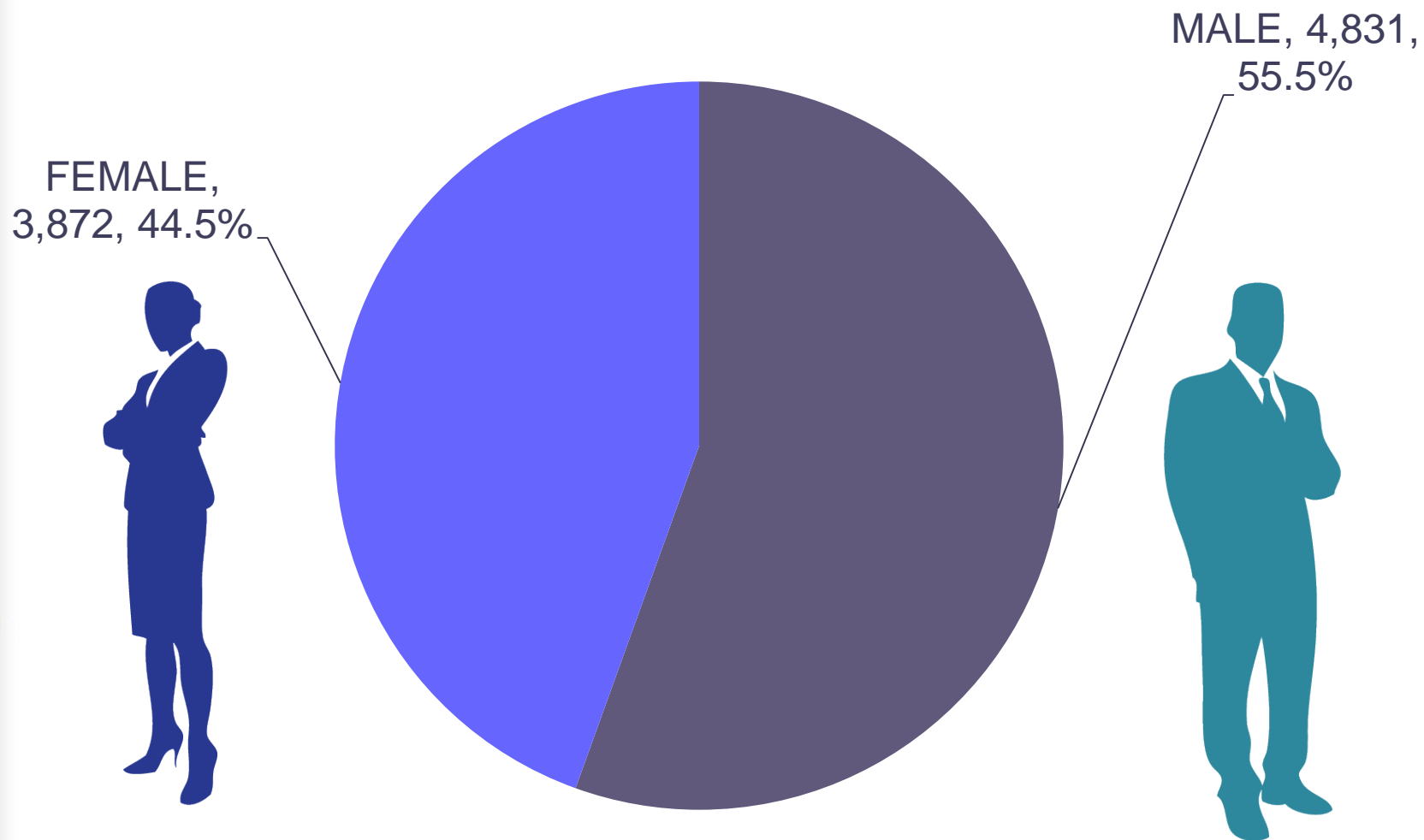
Active Michigan Residents By Occupational Area, 2019



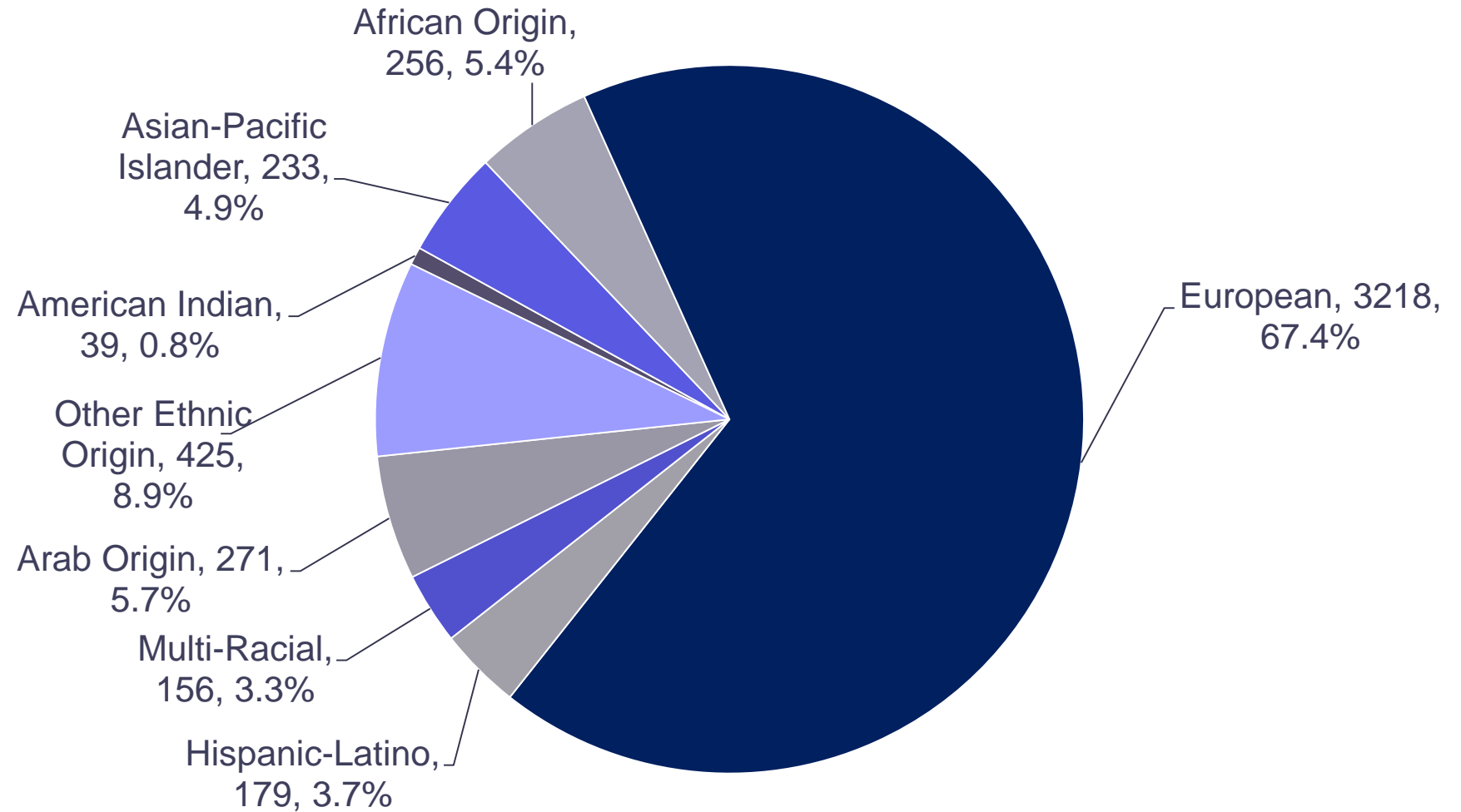
Active Michigan Residents in Private Practice by Firm Size, 2019



Active Michigan Residents by Gender Joining the Bar 2009-2019



Active Michigan Members by Race/Ethnicity Joining the Bar 2009-2019 (excludes no answer and prefer not to answer)



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.



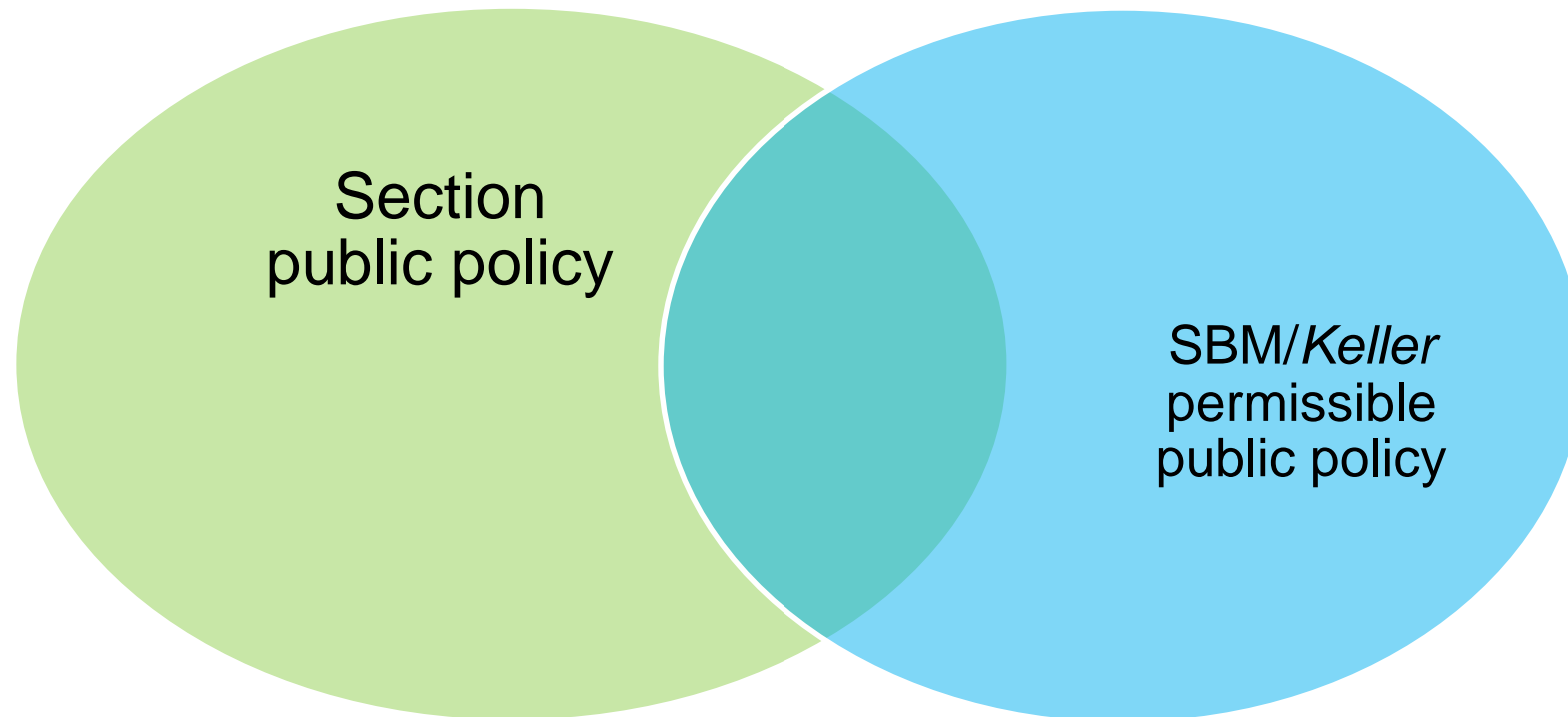
State Bar of Michigan Bylaws

- Section must report position to SBM within 10 days of adopting a position.
- Use web-based form at michbar.org/publicpolicy/report_public
- 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.



Keller-permissible public Policy

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.
- Annual Audit and SBM Annual Financial Report.
- Section Investment Earnings.
- Section Fund Balance Policy and Strategic use of Reserves.
- Other Assistance – Insurance, Budget, Long Range Financial Planning Help.
- 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!

