Policy No. 9-6-: National Conferences

Approved By: Board of Directors
Date Approved: June 23, 2023
Date Effective: October 1, 2023

Policy

Educational programming and national conferences are an important aspect of the FBA mission and a valuable membership benefit. Non-dues revenue obtained through national conferences helps to ensure the financial sustainability of the organization.

A National Conference is defined as:
- Educational program that includes more than three (3) hours of programming or CLE sessions;
- Attended by more than 150 individuals, 100 of which are paying attendees;
- Content (including topics, theme, and speakers) is managed by a "Sponsoring Entity" (standing committee, section, or division);
- Logistics and expenses are managed by the FBA national staff
- Surplus/deficit is shared according to Policy 2-5; and
- All contracts, including, but not limited to, hotel, transportation, reception venue, are signed by the Executive Director or staff designee according to Policy 2-1.

National Conference Procedures

The Sponsoring Entity shall work with national staff on scheduling, program planning, and logistics. Final decisions regarding event location, date, time, logistics, registration fees and sponsorship will be made by the Executive Director and the Executive Committee. To ensure the sustainability of conferences, to offset overhead expenses, and to avoid the use of membership dues to cover expenses, conference budgets should include at least a $20,000 surplus.

Sponsoring Entity with the aid of FBA national staff agree to manage and submit the following to the national staff according to the mutually agreed upon timeline:
- Establish a planning committee chaired by FBA member(s)
- Conference description
- Panel topics, titles, descriptions, and learning objectives
- Speaker selection and session assignments
- Speaker information (name, title, organization, contact information, biographies and photos)
- CLE or program materials
- Awards administration (if applicable)
- Sponsorship prospects and initial solicitation outreach

FBA national staff will manage:
- Venue selection in consultation with Sponsoring Entity
- Contract negotiation and execution
- Timeline including deadlines for committee/speakers
- Budget including registration pricing and sponsorship levels
- Marketing plan and attendee communications
- Onsite staffing and logistics
- Attendee registration procedures
- CLE approval and reporting management and distribution of electronic CLE materials (if applicable)
- Administrative support for sponsorship solicitation and deliverables
- Venue coordination including, but not limited to, food and beverage, room block, and audio-visual specifications

Evaluation of National Conferences
National conferences shall be evaluated annually, and the Executive Director shall report to the Board of Directors on conference performance, including, but not limited to, financial performance, attendance, use of national resources, and Sponsoring Entity participation.

National staff shall conduct with the Sponsoring Entity a post-conference debrief at which the following may be reviewed:
- Post-Event Attendee Evaluation
- Preliminary financials
- Assessment of conference content and Sponsoring Entity's participation
- Assessment of national staff support
- Recommendations for improvement

Establishing New National Conferences
The application process allows the Executive Director and Board of Directors to ensure that National Conferences are true to the mission and vision of the FBA and adequately protects the FBA regarding use of staff and financial resources. Due to the national FBA annual calendar of events, adding a new conference or program can be challenging. Every effort will be made to accommodate a new conference, but the decision shall be made by the Board of Directors based on timing, logistics and resources.

A Sponsoring Entity seeking to sponsor a national conference that has not been held in recent years is required to submit an application to the Executive Director. A sponsoring entity is encouraged to contact the Executive Director to discuss their ideas prior to application submission. All applications will be reviewed by the national staff and sent, along with the staff's recommendation, to the Board of Directors. The Sponsoring Entity will be notified as soon as possible of the board's decision.

A Sponsoring Entity of an existing national conference does not need to submit a new application unless the conference has not occurred in the past two (2) years, or the conference has experienced a net loss for two (2) consecutive programs.

Proposal Criteria
- Applications should be received at least 18 months in advance of the proposed dates; however, this timeframe may be waived by the Executive Director.
- Events should not occur within fifteen (15) business days of a scheduled Annual Meeting and Convention, National Conference, or Leadership Summit.
- If another conference exists that is similar in nature and scope to the proposed new event sponsored by an FBA entity or external entity, efforts must be made to differentiate the new proposed event or to partner with the existing conference.
- Submission of the National Conference Application
- Application to include:
  - Sponsoring entities, submitting members, and proposed planning committee
  - Conference title, theme, and potential session topics
  - Preferred dates
  - Preferred locations
  - Format, delivery method, and preliminary schedule
  - Expected number of attendees and demographics
  - Hotel room block requirements (if applicable)
  - Food and beverage functions
  - Audio-visual equipment and virtual anticipation
  - Potential speakers and affiliated invitation plan
  - Potential sponsors and affiliated outreach plan
  - Budgetary considerations, including but not limited to:
    - Section and Division funding
    - Speaker expenses that will be reimbursed from the conference funds
    - Proposed registration discounts
  - Competing conferences hosted by other organizations

Purpose
This policy addresses the facilitation and creation of national continuing legal education (CLE) programs that are more than three (3) hours in duration designated as a National Conference.

Amended: This policy replaces policy 6-1: Section and Division Sponsored CLE programs and updates/refines Policy 9-7 for Section and Division Continuing Legal Education Guidelines.

National Conference Application

Thank you for your interest in offering substantive programming designed to educate members of the FBA. If you have questions regarding the application, please contact FBA staff at meetings@fedbar.org.

Sponsoring Entity

Sponsoring Entity/Entities:
Submitting Members (*include name, Section/Division/Committee, position, phone, email*):
Proposed Planning Committee (*include name, Section/Division/Committee, position, phone, email*):

Title and Content

Conference Title:
Conference Theme:
Potential Session Topics:

Dates

Events should not occur within fifteen (15) business days of a scheduled Annual Meeting and Convention, Leadership Summit or National Conference.

1st Preference
2nd Preference
3rd Preference

Location

The FBA strongly prefers the conference location to be in the metro Washington, D.C. area due to the cost savings of having a local event.

1st Preference
2nd Preference
3rd Preference

Programming Schedule and Format

Consider if objectives may be met in a virtual format, especially if in-person programming is cost-prohibitive.

Delivery Method (In-Person, Virtual, Hybrid):
Duration (Number Days):
Start & End Time for Day One:
Number of Educational Panels:
Start & End Time for Day Two:

Number of Educational Panels:
Start & End Time for Day Three: Number of Educational Panels:
Concurrent Sessions (Yes/No): If yes, how many?
Projected number of CLE accredited panels:

Attendee Demographics

Expected number of attendees:
Percentage of local vs traveling:
Percentage of private vs public sector:

Room Block

If seeking to host at a hotel, the property may require a contracted room block or charge additional rental fees to offset loss of sleeping room revenue. National conferences do not require room blocks.

Will attendees require contracted sleeping room nights in a hotel? (Yes/No) If yes, how many proposed rooms per night?
List room rate parameters that may impact hotel booking (rate, location, etc.):

Food and Beverage

Meal and reception functions account for a large share of budgeted expenses. Daily selections may include continental breakfast, refreshment breaks, plated lunch, buffet lunch, reception hosted bar, and/or reception catering.

Please list the desired meal and reception functions for each day of the conference.
Day One:
Day Two:
Day Three:

Audio Visual

Audio visual equipment and labor account for a large share of budgeted expenses. Educational panels typically require a laptop, microphone, projector, and screen.

Please list the desired audio-visual equipment for educational sessions:
Do you anticipate virtual presenters (Yes/No)
Do you anticipate virtual attendees (Yes/No)

Potential Speakers

Please list proposed and/or interested speakers:
Share invitation plan (including contacts for any VIP speakers):

Potential Sponsors

Please list proposed and/or interested sponsors:
Share outreach plan:

Budgetary Considerations

Does your section or division have sufficient funds to support a program in case of a loss?
Do you anticipate the conference budget reimbursing any speaker expenses? If so, please detail:
Share proposed registration discounts (or complimentary admittance) for attendees, speakers, committee, and entity leadership: *FBA offers discounted rates for its membership and law students. Early-bird pricing encourages advance registration. A section or division may choose to use its dues revenue to fund scholarships.*

Competing Programs

List of conferences held by other organizations similar in content that may impact attendance (including date/location):

Additional Comments: