



Federal Bar Association

Policy No. 9-6-: National Conferences

Approved By: Board of Directors

Date Approved: March 29, 2025

Date Effective: October 1, 2025

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;
- 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 Conferences must also meet the following attendance criteria based on format:

- In-Person Conference
 - Attended by more than 200 individuals, 150 of whom are paying attendees
- Hybrid Conference
 - (In-Person) Attended by more than 200 individuals, 150 of whom are paying attendees
 - (Virtual) Attended by an additional 50 paying attendees
- Virtual Conference
 - Attended by more than 150 individuals, 100 of whom are paying attendees

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 (following section's revenue share according to Policy 2-5).

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

Limitations on National Conferences

Each Sponsoring Entity is permitted to host one in-person (including hybrid) conference per year. To host an additional conference, the Sponsoring Entity may submit an application to host a virtual event to the Executive Director, subject to approval by the Board of Directors.

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 June 2023: 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.

Amended March 2025: This policy establishes attendance requirements for each National Conference format, limits each sponsoring entity to one in-person conference each fiscal year, and clarifies financial expectations.