

Sample Bar Association Handbook

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ANNUAL CALENDAR

January

- Membership Drive
 - Send new Membership Applications with Cover Letter to previous year's members via U.S. Mail
 - [ATTACH Sample Cover Letter and Application as Appendix]
 - Email Cover Letter and Membership Application County-wide
 - [MAY REQUEST CONTACT INFORMATION FROM FLORIDA BAR TWICE ANNUALLY]
 - As applications are received:
 - Add to website
 - Add information to excel spreadsheet for future mailings
- Monthly Happy Hour – Second Wednesday
 - See Happy Hour Checklist
- Monthly Luncheon – Third Wednesday
 - See Luncheon Checklist
- Board Meeting – Fourth Thursday
 - [ATTACH Sample Agenda, Treasurer's Report, and Minutes as Appendix]
- Send Save the Date and Sponsorship Information for Judicial Reception

February

- Continue Membership Drive
 - Email Cover Letter and Membership Application County-wide
 - As applications are received:
 - Add to website
 - Add information to excel spreadsheet for future mailings
- File Annual Report with Florida Department of State
 - Go to www.sunbiz.org
 - Click the third tab – “E-Filing Services”
 - In the drop down menu, select “Annual Report Filing”
 - “Online Annual Report Filing” page will appear
 - Enter the document number, N21544
 - “Notice” page will appear if annual report has already been filed
 - Continue to file an Amended Annual Report, e.g. when new officers have been installed
 - Fill out the form with the officers' contact information
 - Pay online and seek reimbursement or by check, sent by mail
- Seek Sponsors and Guests for Judicial Reception
- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

March

- Annual Judicial Reception
 - See Judicial Reception Checklist

- Monthly Luncheon
- Board Meeting

April

- Prepare Save the Date and Sponsorship Information for Installation Gala
 - Gala Checklist
- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

May

- Send Save the Date and Sponsorship Information for Gala
- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

June

- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

July

- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

August

- No events scheduled

September

- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

October

- Installation Gala
- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

November

- Monthly Happy Hour
- Monthly Luncheon
- Board Meeting

December

- Holiday Party
- Holiday Luncheon

MONTHLY CALENDAR

First Week

- Secretary Sends “Upcoming Events Email”
 - See Constant Contact Checklist

Second Week

- Secretary Sends Event Reminder for Happy Hour Monday & Wednesday
- Volunteer Organizer and Sponsor Host Monthly Happy Hour
 - See Happy Hour Checklist

Third Week

- Secretary
 - Sends Event Reminder for Monthly Luncheon Monday & Wednesday
 - Prepares name tags and list of RSVP’s
 - Notifies venue of number of RSVP’s
- Luncheon Committee Chair, Treasurer and President Host Monthly Luncheon
 - See Luncheon Checklist
- Treasurer or Secretary Photocopies checks to submit to bookkeeper and deposits luncheon income

Fourth Week

- Thursday - Board Meeting
 - President – Delivers Agenda
 - Treasurer – Delivers Treasurer’s Report
 - Secretary
 - Delivers Minutes of Last Board Meeting
 - Keeps Minutes of Current Board Meeting
 - Committee Chairs Report on Progress
 - Events Chair Conveys Upcoming Event Information to Secretary
- Secretary - Sends out “Upcoming Events” Email for review and comment
 - Publicity Committee Chair Disseminates Event Information to:
 - Daily Business Review
 - Linked In
 - Facebook
 -
- Secretary Sends CLE Codes via Email to those who attended Luncheon

CONSTANT CONTACT

Notices Regarding

- Upcoming Events
 - Notifies “general interest” list of all events in that month
- Happy Hour Reminder
 - Reminds recipients that there is a Happy Hour specifically
- Monthly Luncheon Reminder
 - Reminds recipients that there is a Luncheon specifically
- Special Thanks to our Sponsors
 - For each event where we promised sponsors a thank you email blast

After Board Meeting on Third Thursday of each Month:

- Contact Luncheon Committee and Events Committee Chair
 - Obtain exact name of each event (e.g. Monthly CLE Luncheon, Networking Mixer, Happy Hour to benefit XYZ Charity, Annual Judicial Reception, or Annual Installation Gala)
 - Obtain names of co-sponsoring organizations, or sponsoring business’ information
 - Obtain date, time, location, price, RSVP information
- Prepare “Upcoming Events” Email
 - Include Monthly Luncheon and Happy Hour, with any additional events the Board has agreed to co-sponsor or host
 - Organize from soonest event to most far in the future
 - After all upcoming events for the month, add CLE Number
 - After CLE Number add Membership Application
- Send for review and comment to Board of Directors
 - Google search names of sponsors to ensure they are perfect (no misplaced commas, misspellings, etc.)
 - Double check link to online registration for luncheon is correct
 - Double check that subject line of email says the correct month
 - Double check that the email will be sent at the correct time and day (mid-day, early in the week)
- When the email is PERFECT, then schedule.
- Prepare Individual Event Reminders and Sponsor Thank You Emails with same exact information from Monthly Update email

HAPPY HOURS

General Information Needed:

- Sponsors/ Co-Sponsors
- Date
- Time
- Location
- Price and what will be included

- Beneficiary, if any (e.g. for charitable events)
- RSVP Information

Timeline:

- Six weeks before event – Planning
 - Confirm date – First Wednesday of the Month
 - Check for conflicts with other local bar associations’ events
 - Identify Potential Sponsors
 - organizational co-sponsors
 - monetary sponsors
 - Create budget
 - Approximately \$10 per person should include one drink and light hors d’oeuvres
 - Never pay more than \$500 total
 - Contact potential venues
 - Request free hors d’oeuvres and drink special (e.g. 2 for 1)
 - Aim for an “off night” because venues will always give free hors d’oeuvres in exchange for bringing guests on those nights
 - Request an area to be set aside for our guests
 - Confirm date
 - Sign any contract, as necessary, with Board Approval (at least executive board)
 - Provide information to secretary for inclusion in Monthly Update email blast
 - Sponsors/ Co-Sponsors
 - Date
 - Time
 - Location
 - Price and what will be included
 - Beneficiary, if any (e.g. for charitable events)
 - RSVP Information
- Four weeks before the event – Finalizing
 - Confirm all arrangements again with Venue
 - Visit venue
 - Complete planning phase
- Promotion
 - Check “preview” of Monthly Update email to ensure all information is correct
 - Especially make sure that spellings of sponsors’ names are correct
 - Make sure event information is on the Website
 - Provide information to local news outlets
 - Sponsorship info
 - Collect sponsor fee, if any
 - Obtain sponsor’s logo for use on drink tickets
- Day of event – Hosting & Logistics
 - Arrive 45 minutes before event begins
 - Set up “check in” table
 - Items needed:

- Nametags
 - List of RSVP's and pre-paid guests
 - Blank attendance list
 - Cash box
 - Drink tickets
 - Contract with venue
 - Prepare notes for any announcement planned
- Things to remember:
 - Check carefully to make sure that the venue does not exceed the \$500 budget as the event goes on
- Thursday following event – Reporting
 - Prepare a report including
 - Judges in attendance
 - Members in attendance
 - Gross revenue
 - Cost
 - Net income
 - Provide sponsor with attendance list

LUNCHEONS

- Eight Weeks Prior to Luncheon
 - Confirm Speaker
- Six Weeks Prior to Luncheon
 - Obtain Speaker's outline
 - Submit CLE Credit Application to Florida Bar
- Four Weeks Prior to Luncheon
 - Make sure that luncheon is posted on website
 - Make sure that Secretary has information to be emailed in "Upcoming Events"
- Third Monday
 - Send email to venue with number of RSVPs
 - Organize name tags
- Third Wednesday
 - Finalize RSVP list
 - Print remaining name tags
 - Supplies needed:
 - Blank Attendance list
 - Final list of members
 - Membership applications
 - Cash boxes
 - Receipts
 - Basket for used name tags
 - Arrive at venue at 10:45 AM
 - Obtain invoice from venue
 - Pay with check
- Fourth Wednesday

- Prepare luncheon report
 - Judges' attendance
 - Members' attendance
 - Non-members' attendance
 - Revenue
 - Comparison to previous luncheons

JUDICIAL RECEPTION

Timeline

- Three months before event – Planning
 - Prepare sponsorship package
 - Confirm date
 - Check for conflicts with other local bar associations' events
 - Identify Potential Sponsors
 - Create budget
 - Ticket price should cover cost of event
 - Food/Beverage
 - Signage
 - Staff
 - Tables/Linens
 - Contact potential venues
 - Confirm date
 - Sign any contract, as necessary, with Board Approval (at least executive board)
 - Provide information to secretary for inclusion in Monthly Update email blast
 - Sponsors/ Co-Sponsors
 - Date
 - Time
 - Location
 - Price and what will be included
 - RSVP Information
- Four weeks before the event – Finalizing
 - Continue to solicit sponsorships
 - Confirm all arrangements again with Venue
 - Visit venue
 - Complete planning phase
- Promotion
 - Check “preview” of Monthly Update email to ensure all information is correct
 - Especially make sure that spellings of sponsors' names are correct
 - Make sure event information is on the website
 - Provide information to local newspapers and industry publications
 - Sponsorship Follow-Through
 - Collect logos for sponsors
 - Prepare 2x3 foamcore posters to be prominently displayed at event
 - Prepare powerpoint slideshow, if any

Supplies Needed For Check In

- Finalized RSVP list
- Printed name tags
- Blank Attendance list
- Membership applications
- Cash boxes
- Basket for used name tags

Arrive at venue at 4 PM

- Obtain invoice from Caterer
- Check for Caterer

After Event

- Send thank you notes to sponsors
- Send blast thank you email to sponsors

INSTALLATION GALA

Prepare budget, considering:

- Venue
- Food
- Beverages
- Staff
 - Servers
 - Bartenders
 - Valet parking
- Decorations
- Music
 - Cocktail Hour
 - Reception
- Photography
- Stationary
 - Email
 - Save the date cards
 - Invitations/ RSVP cards
 - Programs
- Promotion and advertising
- Travel and lodging for guest speaker
- Gifts
 - Plaques for officers
 - Appreciation plaque or other gift for speaker
 - Party favors for guests?
 - Items for raffle

Timeline

- Four months before event – Planning
 - Prepare sponsorship package and solicit sponsors

- Confirm date
 - Check for conflicts with other local bar associations' events
- Identify Potential Sponsors
- Contact potential venues and confirm date
 - Sign any contract, as necessary, with Board Approval (at least executive board)
- Secure speakers and presenters
- Prepare Save the Date for electronic dissemination with
 - Sponsors/ Co-Sponsors
 - Date
 - Time
 - Location
 - Price and what will be included
 - RSVP Information
- Three months before the event – Finalize planning
 - Continue to solicit sponsorships
 - Confirm all arrangements again with Venue
 - Visit venue
 - Complete planning phase
- Promotion
 - Make sure event information is on the website
 - Provide information to local newspapers and industry publications
 - Sponsorship Follow-Through
 - Collect logos for sponsors
 - Prepare 2x3 foamcore posters to be prominently displayed at event
 - Prepare powerpoint slideshow, if any
 - Send invitations
- Preparation
 - Collect RSVP's
 - Collect Sponsorships
 - Finalize plans with all vendors and notify venue
 - Finalize speakers and program
 - Fix menu
 - Prepare sponsorship items (powerpoint presentations, sponsor boards, etc.
- After event:
 - Send thank you notes to sponsors
 - Send blast thank you email to sponsors
 - Send press release to local news outlets