Houston Bar Association

2024-2025 Section Manual

Table of Contents

I. Operation Guidelines for HBA Sections
   A. How Sections are Formed
   B. How Sections are Governed
   C. Section Expenses and Budgets
   D. Guidelines for Section Expenditures
   E. General Section Policies
   F. Charitable Contributions
   G. Section Financials
   H. Section Communications
   I. Notifying Section Members about Meetings
   J. Resolution Regarding HBA Mailing List
   K. 2024-2025 HBA Section Dues

II. Dates to Remember: 2024-2025 Bar Year

III. HBA Liaison Organizational Chart
Operation Guidelines for HBA Sections

I. How Sections are Formed

A. The Houston Bar Association (HBA) determined that a written policy regarding the consideration and establishment of new Sections would be a benefit to the bar membership. Therefore, the HBA established this policy.

B. To be considered for establishment of an HBA Section, interested persons must submit the following information to the HBA Board:

1. A business plan that describes the organization (including initial council members), the area of law that is the focus covered by the Section, the reasons that area of law should have its own Section, the anticipated membership, and the bases for projecting the membership totals.

2. A proposed set of By-Laws in the format approved by the HBA that includes the meeting schedule proposed, and the dues to be charged.

3. A petition signed by at least 35 current members of the HBA expressing interest in and support for the new Section.

C. When such a submission is made, the HBA Board will consider the submission and may invite interested persons to discuss the proposal. The HBA Board reserves the sole right to determine whether any new Section should be created and the governance of that Section.

II. How Sections are Governed

A. The Houston Bar Association (HBA) determined that a written policy regarding the consideration and establishment of new Sections would be a benefit to the bar membership. Therefore, the HBA established this policy.

Article V, Section 2
The Board of Directors of the Houston Bar Association may remit to each established and existing Section provided for above such portion of the annual dues paid to the Association by members of any specific Section necessary to assure the proper functioning of the Section. Each Section shall submit reports as requested by the HBA Board of Directors. The Board of Directors may, acting solely within its own discretion, terminate the formal existence of a Section upon the basis of such review if it deems that the continuance of such Section is not in the best interests of the Association.

B. Consistent with the HBA Constitution, the Board establishes the following additional policies applicable to Section governance.

1. The fiscal year of a Section should conform to the HBA fiscal year of July 1 – June 30. TO BEGIN PREPARING FOR EACH YEAR, SECTIONS MUST HAVE NEW OFFICERS ELECTED PRIOR TO MAY 1.

2. Section Expenses and Budgets

   a. The HBA receives all dues income and, thereafter, distributes the funds necessary for the administration of the Sections. The HBA may allocate some portion of the dues income for HBA staff assistance and expense.

   b. The Section’s governing body shall submit an annual budget to the HBA for each fiscal year (July 1 - June 30).

      i. Each budget must include reasonable, good faith estimates of all anticipated revenues and expenses of the Section for the fiscal year. All sources of a Section’s anticipated revenues and expenses must be separately categorized and described in the budget.

      ii. If requested, the staff of the HBA is available to provide each Section with historical financial information for the purpose of assisting in the preparation of the Section budget.
iii. The proposed budget shall be submitted by September 8 of each year.

c. All budgets shall be submitted to the Section Liaison of the HBA.

d. Sections with net revenue of less than $1,000.00 for the preceding fiscal year are exempt from the requirement to prepare and submit budgets.

e. Expenditures requested by the Section’s governing body will be submitted to the HBA for approval under the guidelines set out in Section 3. It is expected that such expenditures will have been part of the budget previously made. Expenditures that have not been anticipated or previously forecast will be subject to approval by the HBA Board.

f. Section members are not authorized to sign contracts on behalf of the HBA or the Section. The HBA Executive Director must review and sign all contracts.

3. Guidelines for Section Expenditures

Generally, expenses are borne by the individual members or their firms. However, there are reasonable and necessary expenses for which reimbursement is appropriate. The purpose of these guidelines is to outline the HBA’s policies concerning expenditure and reimbursement in order to ensure consistency and to ensure that the funds produced by the Sections are dedicated to the primary function of service.

The guidelines for expenditure of Section funds and the reimbursement of Section expenses are as follows:

a. Reimbursements requested should be reasonable in amount and reasonably incurred, and members should bear customary costs of belonging to a voluntary organization. **Requests for reimbursement must be submitted on the form approved by the HBA and must be accompanied by original receipts and proof of payment.**

b. Travel and meeting expenses for Section officers or council members are not reimbursable for Section events without prior approval of the HBA Board of Directors.

c. A speaker may request reimbursement for reasonable travel expenses, excluding first class airline travel. Each Section may provide their speakers with modest gifts costing no more than $100.00. Honorariums shall not be paid unless approved in advance by the HBA Board of Directors.

d. Each Section may provide a gift, the cost of which shall not exceed $100.00 per person, to the Section officers or council members in recognition of their service to the Section for the Section’s fiscal year (July 1 through June 30). Gifts to individuals other than Section officers or speakers must be approved in advance by the HBA Board of Directors.

e. All other gifts in excess of $100.00 for any purpose must be approved in advance by the HBA Board of Directors.

f. Charitable contributions which are requested by Sections to be made out of Section funds must first be approved by the HBA Board of Directors by means of the Section budget. **The HBA encourages Sections to give first priority, in such contributions, to charities approved by the HBA Board.** Section chairs must get HBA Board approval of all section-sponsored charitable contributions to non-HBA approved charities, even if such contributions are recurring. If a Section wishes to establish scholarships or give awards to law students, the Section must provide those awards and scholarships at each of the Houston Law schools on an equal basis. **A list of approved charities is available below or through the HBA office.**
g. Special Projects: With prior approval of the HBA Board of Directors, Sections may choose to accumulate surplus funds from year-to-year for the purpose of providing funding for a special project of the Section. The HBA encourages well-planned and documented special project initiatives of the Sections and their membership.

h. Any exception to these Guidelines requires the approval of the HBA Board of Directors.

III. General Section Policies

A. Any Section which has total membership below 20 is subject to being reviewed by the HBA for continuation.

B. The HBA adopted the following policy regarding judicial campaigning at HBA/CLE events and judicial endorsements:

   There should be no active campaigning, no literature distributed, no buttons worn, nothing to indicate that a judge is in a contested race, and certainly nothing urging a favorable vote. Judges and judicial candidates may serve on the CLE committee and appear on CLE programs, and such positions cannot be used to urge the election of any candidate.

   No Section, committee or member of the HBA may utilize the HBA mailing list or website to solicit funds for, or make endorsements of, any judicial candidates for election.

C. Section members and officers are responsible to the HBA Board. The HBA Board of Directors meets the third Tuesday of every month at 4:00 p.m. in the HBA Board room.

D. The HBA President is the official spokesperson for the organization.

E. Section officers and members may not testify or lobby the legislature on behalf of the HBA.

IV. Charitable Contributions

In making Section sponsored charitable contributions, the HBA Board encourages Sections to give first priority to HBA Board approved charities. Section chairs must get HBA Board approval of all Section-sponsored charitable contributions to non-HBA approved charities, even if such contributions are recurring. Some of the HBA approved charities include:

   - The Houston Bar Foundation
   - The Houston Bar Association and Houston Bar Foundation’s Harvest Celebration benefitting Houston Volunteer Lawyers
   - The Houston Bar Association Dispute Resolution Center
   - Habitat for Humanity
   - Houston Food Bank

If you have a question about whether a particular entity is an HBA approved charity, please contact the HBA Section Liaison, Ashley Steininger.

V. Section Financials

A. Dues income for all Sections is deposited in an individual general ledger account for each Section. Expenses are paid from this account. (Please read Guidelines for Section Expenditures in Section 3)

B. Currently, the HBA office charges each Section $11.00 per member for administrative costs. This charge will be made annually by showing a journal entry (debit) assessment to the Section account.

C. The HBA will provide quarterly financial statements to all Sections. Deposits of cash and checks should be sent to HBA within two weeks of the program and need to include a list of the monies sent with a total so that the total can be verified. Please contact the HBA Section Liaison, Ashley Steininger, at 346-471-3431 direct office, 281-787-1237 cell, ashleyg@hba.org, for further questions.
Section Communications

The HBA encourages every Section to appoint someone to serve as liaison on communications, ensuring that information gets in the Houston Bar Bulletin, in the bi-weekly Education e-Bulletin and on the Section’s webpage and social media. By completing the online Section event submission form, we will automatically include your program in the HBA’s Bulletin, Education e-Bulletin, online calendar, on your web page and through social media if you designate. Use of the online submission form is strongly encouraged to ensure that section communications reach their desired location. The HBA can help you publicize your event through the following opportunities:

Houston Bar Bulletin

The Houston Bar Bulletin is a monthly online newsletter. Members receive an email generally around the first week of every month with a direct link to the Houston Bar Bulletin, and the link is posted on the homepage of the HBA website. The Houston Bar Bulletin includes information about activities, upcoming events, news and features about members, Committee activities, Section programming with live links to register and CLE and professional development programs. The Bulletin includes a Sections Calendar Page for meetings during the current month. Please consider submitting photos and other news from your section activities. The deadline is the third Monday of the month prior to publication:

The Bi-Weekly Education e-Bulletin

The bi-weekly Education e-Bulletin is sent via email to all HBA members on Sundays to update members about upcoming CLE programs, online videos and Section CLE luncheons and programming. Completing the online event submission form will get your program advertised in the Education e-Bulletin.

Website

The HBA website (hba.org) promotes and provides information on HBA Sections and activities. There is a general Section landing page where you will find the Section handbook, Event Submission form, Budget form, New Officers form, Scholarship Request Form and Reimbursement form. Each Section has its own web page on the website that includes contact information for officers, names of council members, membership dues, an explanation of the Section’s mission and activities, a link to Section activities on the web calendar, CLE papers, a link to the Section’s website (if the Section maintains a website), law student policies, and Twitter feeds (if the Section maintains a Twitter account). The HBA encourages each Section to designate a liaison to make sure that Section information is up to date and that the Section is making the best use of its webpage.

Social Media Opportunities

The HBA has several social media accounts and Section members are encouraged to share information about their activities. Please encourage your members to follow the HBA on social media. If you complete the online Section event submission form, your programming can be advertised on HBA social media.

- Twitter: Follow us @thehba. Feel free to tweet (mentioning or tagging the HBA) from your events.
- Facebook: Like and follow the HBA on Facebook and share our posts. Tag the HBA (@Houston Bar Association) on your Facebook posts.
- Instagram: Tag @houston_bar_assoc
- LinkedIn: www.linkedin.com/company/houston-bar-association/

The Houston Lawyer

The Houston Lawyer is the HBA’s bimonthly magazine. Ideas for substantive feature stories should be discussed with the Communications Director or the Editor in Chief.
Press Releases

The HBA staff works with Sections to generate news releases on programs that are of interest to the general public. Draft releases should be sent two to four weeks prior to an event.

Letterhead

The HBA staff can prepare a letterhead template for your Section.

The e-Bulletin – not for general section programming

The e-Bulletin, which is sent via email to all HBA members every Monday to remind members about upcoming programs and events, does not run information about CLE programs, but can include information about other section activities.

Ashley Gagnon Steininger
Associate Executive Director
ashleyg@hba.org
346-471-3431 direct
281-787-1237 cell

Maggie Martin
Marketing & Communications Director
maggiem@hba.org
346-471-3428 direct

Alli Hessel
Education Coordinator
alli@hba.org
346-471-3293 direct

Briana Ramirez
Communications Specialist
brianar@hba.org
713-759-1133 office

Ron Riojas
Membership & Technology Services Director
ronr@hba.org
713-759-1133 office
Notifying Section Members About Meetings

Each Section is responsible for sending notice to its members of upcoming meetings. Sections may choose to notify members of meetings through the mail or via e-mail and on social media.

Available Communication Methods

Notification by E-mail

*Note: All Section blast emails and notice distributions are processed by HBA. HBA member emails cannot be exported or shared due to HBA board policy.*

All Sections currently send meeting notices to section members via e-mail. The Section chair or CLE coordinator should complete the online event submission form or e-mail the notice as a text file to ashleyg@hba.org. Please include all pertinent information (date, time, location, speaker and topic, cost, reservation information, and contact name and phone). **Please be aware that the HBA does not have e-mail addresses for all members.** It is the Section's responsibility to make sure that its members have current email addresses on file with the HBA, if the Section chooses e-mail as the primary way to communicate with its members. The Section may consider an initial mailing to all members, requesting that members supply their current e-mail address to the HBA membership department.

Meeting notices should be e-mailed to members 2 to 3 weeks in advance of a meeting to provide sufficient notice. **There is no charge to the section for e-mailed notices.**

General Section Blast E-mails

Sections can also use blast e-mailing to send members for section related announcements (e.g. LegalLine recruitment e-mails) or other HBA Section program information with prior approval from the Section chairperson. In addition, Sections can also receive blast e-mails from the HBA regarding upcoming events or programs.

Written Notification by Mail

If a paper communication is desired, please contact Ashley Steininger with at least three weeks’ notice.

Surveying Section Members

The HBA has a program to send and tabulate simple member surveys. If your section wants to survey its members about an important issue or election, please contact Ashley Steininger to determine if this is an appropriate format and to assist with set up.
Resolution Regarding HBA Mailing List
Adopted by HBA Board of Directors, September 21, 1993

The Board of Directors of the Houston Bar Association does hereby resolve that:

It is the policy of the Houston Bar Association to sell mailing labels or other mailing information containing the names and addresses of members of the HBA or any of its Sections or committees only to current members of the HBA for use by such members:

(1) in connection with campaigns for election to local, state, federal or bar offices; official bar usage by other bar associations; educational usage by recognized educational institutions or non-profit organizations;

(2) in connection with professional announcements, including but not limited to announcements regarding the opening or relocation of offices, the establishment of firms or practices, the addition of partners or associates, certification by the Board of Legal Specialization, and the like, but,

(3) not for commercial purposes.

Upon receipt of a written request from a current HBA member stating that labels or other mailing information shall be used only for the purposes stated above in (1) or (2) and not for commercial purposes, the Executive Director is authorized to sell labels or mailing information at such fee as the Board of Directors shall from time to time establish. A check for the full amount must accompany each order.

- All Sections are encouraged to adhere to the mailing list guidelines set forth above.

- Sale of Section mailing labels must be authorized in writing by the Section chair or treasurer.

Labels are furnished for the confidential, one-time use of the purchaser only. They are not to be used to compile or prepare mailing lists, marketing aids, directories, or advertising lists conveyed by any telephonic, mechanical or electronic means, or any other types of complications that are sold or otherwise provided to third parties.

(4) the HBA has also adopted the following policy regarding campaign solicitations or endorsements: no section, committee or committee member of the HBA may utilize the HBA mailing list or website to solicit funds for, or make endorsements of, any judicial candidates for election.

Houston Bar Association labels and associated mailing lists are copyrighted by the Houston Bar Association. Violations will be prosecuted in accordance with copyright laws.

If you have any questions about the use of these labels, please contact the HBA Membership Department at membership@hba.org.
HBA Section Dues – 2024-2025

HBA and Section dues can be paid online [hba.org](http://hba.org) or by sending cash or check to the HBA office. Each section is assessed a fee of $11 per member by the HBA to cover administrative costs.

<table>
<thead>
<tr>
<th>Category</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative Dispute Resolution</td>
<td>$25.00</td>
</tr>
<tr>
<td>Animal Law</td>
<td>$20.00</td>
</tr>
<tr>
<td>Antitrust &amp; Trade Regulation</td>
<td>$35.00</td>
</tr>
<tr>
<td>Appellate Practice</td>
<td>$30.00</td>
</tr>
<tr>
<td>Bankruptcy</td>
<td>$35.00</td>
</tr>
<tr>
<td>Commercial &amp; Consumer Law</td>
<td>$35.00</td>
</tr>
<tr>
<td>Construction Law</td>
<td>$45.00</td>
</tr>
<tr>
<td>Corporate Counsel</td>
<td>$35.00</td>
</tr>
<tr>
<td>Criminal Law &amp; Procedure</td>
<td>$25.00</td>
</tr>
<tr>
<td>Energy Law (formerly known as Oil, Gas &amp; Mineral Law)</td>
<td>$40.00</td>
</tr>
<tr>
<td>Entertainment and Sports Law</td>
<td>$25.00</td>
</tr>
<tr>
<td>Environmental Law</td>
<td>$35.00</td>
</tr>
<tr>
<td>Family Law (3 yrs. or less)</td>
<td>$40.00</td>
</tr>
<tr>
<td>Family Law (more than 3 yrs.)</td>
<td>$55.00</td>
</tr>
<tr>
<td>Federal Practice</td>
<td>$35.00</td>
</tr>
<tr>
<td>Health Law</td>
<td>$40.00</td>
</tr>
<tr>
<td>International Law</td>
<td>$40.00</td>
</tr>
<tr>
<td>Juvenile Law (5 yrs. or less)</td>
<td>$15.00</td>
</tr>
<tr>
<td>Juvenile Law (6 yrs. or more)</td>
<td>$30.00</td>
</tr>
<tr>
<td>Labor &amp; Employment Law</td>
<td>$35.00</td>
</tr>
<tr>
<td>Law Practice Management</td>
<td>$35.00</td>
</tr>
<tr>
<td>Litigation</td>
<td>$40.00</td>
</tr>
<tr>
<td>Mergers and Acquisitions</td>
<td>$25.00</td>
</tr>
<tr>
<td>Probate, Trusts &amp; Estate</td>
<td>$45.00</td>
</tr>
<tr>
<td>Real Estate Law</td>
<td>$28.00</td>
</tr>
<tr>
<td>Securities, Litigation &amp; Arbitration</td>
<td>$35.00</td>
</tr>
<tr>
<td>Social Security</td>
<td>$35.00</td>
</tr>
<tr>
<td>Taxation 4 years or less</td>
<td>$50.00</td>
</tr>
<tr>
<td>Taxation 4 years or more</td>
<td>$75.00</td>
</tr>
</tbody>
</table>
Important Links and Online Forms for Section Leaders
Also located on the HBA website at www.hba.org/sections

Forms

- Submit meeting/event information
- Budget form
- Reimbursement form
- Scholarship form
- Cash and Check Submission form
- Vendor Payment form
- Survey of section points of contact and initiatives
- Submit new officers

Templates

- Paid Receipt template
- Invoice template
- Printed nametags
- Creating flyers and graphics
2024-2025 Dates to Remember

September 6, 2024  Section Budgets are due. The budgets can be completed online at https://www.hba.org/?pg=Section-Budget-Template

October 2024     If not already included in the budget submitted on September 6th, Harvest Celebration donations benefiting pro bono and the Houston Volunteer Lawyers are due by October 25, 2024. The Harvest Celebration will be held on November 11, 2024 and is an HBA approved charitable contribution.

May 1, 2025      Section election results are to be sent to your Section Liaison before May 1. Be sure to schedule your election PRIOR to May. The HBA can assist with electronic voting for you.
HBA Liaison Organization Chart

1. Executive Director is Executive Director and Secretary to HBF and serves as an ex-officio board member to HVL, DRC, and HLRS.
2. HBF is charitable arm of HBA established in 1982. HBF Board members serve 3-year staggered terms.
3. HBA Education Director & Sections Liaison reports to the Executive Director and is generally responsible for maintaining records of committee appointments and rosters. All Committee chairs and committee members are appointed by President of the HBA.
4. HBA Education Director & Sections Liaison reports to the Executive Director and is generally responsible for all administrative services provided to Sections.

HBA Board of Directors (Elected)
- HBA Sections
  - (Each Section elects chair & council. Any HBA members may join any section. See 4 below)
  - HBA Committees
    - (Appointed by HBA President. See 3 below)
- HBA Executive Director
  - (Reports to HBA Board)
    - HBA Staff
      - (Reports to HBA Executive Director)
- HBA Executive Director (See 1 below)
  - Houston Bar Foundation
    - (13 voting member board appointed by HBA President. See 2 below)
  - Houston Volunteer Lawyers
  - Dispute Resolution Center
  - Houston Lawyer Referral Service