

Mecklenburg County Bar Continuing Legal Education Committee

CLE Proceed Sharing and Honorarium Policy

Drafted 02/20/2018

Approved by Board of Directors: 3/22/2018

It is the intention of the Mecklenburg County Bar (MCB), Continuing Legal Education Committee (CLE), to provide quality education opportunities to our membership, and the attorneys of North Carolina. While it is the usual practice to rely upon our member and other attorneys to volunteer their expertise to raise the quality of our legal community by teaching CLEs, it is acknowledged that there are times and subjects that may require outside speakers, and the sharing of proceeds or other direct payments to provide such programs.

Policy

For purposes of this policy, “proceed sharing” means a direct monetary payment from the MCB to a speaker or planner, from the net proceeds derived from the attendees of that event. An “honorarium” means a direct payment to a speaker at a CLE event. The MCB shall not share proceeds, or issue an honorarium, to speakers or course planners unless all of the following exist:

1. The speaker / planner is not a member of the MCB.
2. Sharing of the proceeds is essential to the success of the program as determined by the program chair and cannot be waived or reduced.
3. The CLE Program Planner of the CLE shall submit a proposal to the CLE Committee, detailing the program; the expected attendance; the planned budget and expenses; and all other sources of funding or sponsorship (See Below).
4. There is a reasonable expectation that the CLE program affected by the proceeds sharing or honorarium, will generate sufficient net revenues to offset the expense of the payment, and still serve the needs of MCB.
5. The proceeds sharing or honorarium is otherwise reasonable in the opinion of the CLE Committee.

In order to share proceeds or issue an honorarium, 1 – 5 must be met and, in addition, requests from the state and federal judicial branches or the Mecklenburg County Court System will be given special consideration.

This policy is not intended to preclude and does not apply to reimbursement of reasonable travel expenses, lodging or meals; however, such expenses should be made a part of the initial budgeted expense of the CLE program, nor is it intended to preclude the granting of CLE or tuition credits to speakers or course planners. This policy does not apply when any proceeds or other source of payment to the speaker or planner is covered in full by a person or entity other than the MCB.

Procedure

The procedure for obtaining approval of proceed sharing or payment of an honorarium by the MCB is as follows:

1. The CLE program planner or designee will submit a written proposal to the MCB CLE Assistant Director with a copy to the CLE Committee Chair. Said proposal should begin with the MCB CLE form established for this purpose, and may include additional pages as needed to include the information required by the above policy, including (but not limited to):
 - a. the name of the program;
 - b. the time, date, and location of the proposed event;
 - c. the name and contact information of the program planner;
 - d. the name and contact information of the proposed speaker;
 - e. the amount of the proposed proceed sharing or honorarium;
 - f. and should include a proposed budget, which includes:
 - i. the expenses (venue, catering, materials, speaker fee, etc.); and
 - ii. the source and amounts of all funding or sponsorships.
2. The proposal should be submitted no less than 8 weeks prior to the event, to allow it to be reviewed by the CLE Committee. No request will be granted if submitted within 8 weeks or less of the event.
3. Proposals will be reviewed and approved, modified or denied at the next regularly scheduled meeting of the CLE Committee. The person(s) submitting the proposal should plan to appear and present the proposal to the CLE Committee to answer questions regarding the proposal. If the CLE Committee is unable to review the proposal due to time constraints, then the CLE Committee chairperson shall have the authority to act on behalf of the Committee.
4. Any proceeds shared, or honorarium paid, shall follow the following guidelines:
 - a. Proceed sharing, may only exceed a 50/50 net proceed split, upon a finding of good cause to the CLE Committee, directly reflecting the enumerated reasons for the fee-split above, and to attract especially good events, and will likely be attended by more than 35 attendees;
 - b. Proceeds to be split shall only come from revenue generated from admission fees gathered from attendees;
 - c. Proceeds to be split shall only be taken from Net Proceeds, to wit: after the payment of all expenses and costs in planning, advertising, hosting, and running the event in question. Including but not limited to: Bar CLE credit reporting fees, travel reimbursements, lodging of speakers, advertising, course material printing and preparation, space rental cost, catering, etc.
 - i. Event Planners should be mindful that MCB Staff hours are valuable and limited, and any expectation of expenditure of time of staff for advertising, etc., should be noted in the proposal;
 - ii. Event Planners should also be cognizant that MCB venue space is on a first come, first served basis.
5. The decision of the CLE Committee shall be final.



HONORARIUM & PROCEEDS SPLITTING REQUEST

Please complete this form when requesting an honorarium or a proceed sharing request

Submitted By:		Request Date:	
Name:		Company / Firm:	
Address:		State:	Zip:
Telephone Number:		Email:	

Requesting Honorarium or Proceeds Splitting for:			
Event:			
Speaker:		Date of Event:	
Name:		Company / Firm:	
Address:		State:	Zip:
Telephone Number:		Email:	

Request:			
Amount Requested		Total Budget	
Event Location		Venue Cost	
Catering		Catering Cost	
Cost of Attendance		Cost of Materials	
MCB Staff Needs: (Types/ Hours Est'd)			
Sources of Funding / Amount			

APPROVED _____

DENIED _____

Approving Committee: _____

Committee Chair Signature: _____

Director of Continuing Legal Education Signature: _____

Date: _____