



ADMINISTRATION & FINANCE SECTION WORKSHOP

January 22, 2019 - Caesars Palace, Las Vegas, Nevada



12:30 PM - 1:00 PM

Registration

Office 4 Registration Desk, Promenade Level

All programming takes place in
**Octavius Ballroom 4,
Promenade South**

1:00 PM - 1:50 PM

Session A: IT - Basics to Best Practices

Come and get sound advice in three areas covered by a current State Bar Chief Technology Officer. First, we will provide a key list of IT policies, standards, and best practices each organization should have to prepare for the future. Do you have an IT Strategic Plan? Learn what is it, how you go about developing it, and what the parts and/or pieces are to build the foundation of an IT Strategic Plan. IT Audits - what they are, should your bar consider one, what is the value, what do they cover, and what is the relative cost. Learn the importance of vendor selection to the final deliverables.

SPEAKER

Jason M. Cecil, MBA, PMP, Chief Technology Officer, The Missouri Bar

1:50 PM - 2:00 PM

Break

2:00 PM - 2:50 PM

Session B: Professionalism & Conduct in Bar Associations

Clearly a hot topic in the world today, the A&F Section will examine the Incidence of sexual harassment and discrimination at bar associations. A survey was sent to NABE members in December, asking them what related behavior they have experienced in the course of their employment at their bar associations. We'll begin with a review of the survey results, and discuss any trends in the data. Attendees will be encouraged to join the discussion to provide differing perspectives, insights, and support on how to effectively manage these issues in their associations.

SPEAKERS

Heather Seavey, Deputy Executive Director, Maine State Bar Association

Angela P. Weston, Executive Director, Maine State Bar Association

2:50 PM - 3:00 PM

Break

3:00 PM - 3:50 PM

Session C: Financial Best Practices - Exploring FASB's New Not-for-Profit Financial Reporting Standard - ASU 2016-14

This new financial reporting standard aims to improve the reporting for not-for-profit organizations (such as most bar associations), and replaces the reporting model that has existed for 20 years. After more than three years of debate and comment, this new FASB standard was released in August 2016. This standard will change the way not-for-profit entities will classify net assets and prepare financial statements, and will provide more useful information to external users of the entities financial statements. The new standard is effective for annual financial statements issued for fiscal years beginning after December 15, 2017, so many organizations are currently involved in the implementation.

Our presenter for this topic is Kathy Gerhart, CFO of the State Bar of Arizona, and is currently Treasurer of the NABE A&F Section. She will be presenting and leading a group discussion on implementation issues of the new standard.

SPEAKER

Kathy Gerhart, Chief Financial Officer, State Bar of Arizona and NABE A&F Treasurer

3:50 PM - 4:00 PM

Wrap Up & Adjourn

**NABE 2019 Midyear Meeting Registration
Tuesday, January 22, 2019
3:00 PM - 6:00 PM
Office 4 Registration Desk,
Promenade Level**

ADMINISTRATION & FINANCE SECTION LEADERSHIP

Leadership

Ann K. Gregorie, Chair, Baton Rouge Bar Association
Whitney von Haam, Chair-elect, Wake County Bar Association
Dennis J. Archer, Secretary, Illinois State Bar Association
Kathy Gerhart, Treasurer, State Bar of Arizona
Angela P. Weston, Immediate Past Chair, Maine State Bar Association
Lisa Deane, Board Liaison, State Bar of Arizona

Council Members

Bonnie Biggs, Durham County Bar Association
Jason Cecil, The Missouri Bar
Victor Velazquez, Maryland State Bar Association
Deanne Mosley, The Mississippi Bar
Trudy Levindofske, Orange County Bar Association

Staff

Rebecca Green-Jablonsky, ABA Division for Bar Services
Nora Warens, ABA Division for Bar Services
Emma Buell, ABA Division for Bar Services

THANKS TO THE PROGRAM PLANNING COMMITTEE

Jim Horsch, Planning Committee Chair, State Bar of Michigan
Dennis J. Archer, Illinois State Bar Association
Deanne Mosley, The Mississippi Bar
Julie Ourso, Baton Rouge Bar Association
Heather Seavey, Maine State Bar Association
Angela P. Weston, Maine State Bar Association