

## **Introduction**

The Association thanks you for taking on the responsibility of leading a team to produce a report for the Association's consideration. You have taken on the task of understanding and providing recommendations for action by the Association on an issue that the Association can have a pivotal role in resolving or impacting.

Once you have completed your research and developed your recommendations, you need to draft a report seeking the approval of the House of Delegates (HOD) for adopting the recommendations for action by the Association. This guide provides you with an outline to draft your report and recommendations.

Keep in mind the audience for your report. Our reports are reviewed not just by the HOD for approval but our members, other bar associations, government agencies and the broader community that is impacted by your topic for information to ignite into action. These various readers are not as steeped in the nuances of the issues as you are. The role of the report is not only to provide a statement of legal research and recommendations; but to present a compelling case based on law and research for why the Association is taking action to address an issue.

Should you have any questions about this guide, please contact the Association's secretary at [secretary@nysba.org](mailto:secretary@nysba.org).

### **I. Cover Note**

Please include an informational cover note for your report that the staff will use to draft a formal cover note to accompany your report for the HOD. For internal entities, the date that the report was voted on and approved by the NYSBA section/task force/committee, or, for external entities, the date that the report was approved for conveyance to the House of Delegates Reports Group.

### **II. Title Page**

The Association will prepare a formal title page. In your draft, please include the following information:

- The title you want the report to have.
- The name of the NYSBA entity responsible for the report, placing the words "New York State Bar Association" before the name.

### **III. Listing of Members Page(s)**

If the report was approved by a Section or Standing Committee, list the names of the chair(s) and members of the drafting committee.

If the report is sponsored by a Task Force, list all members of the Task Force and any Task Force subcommittees.

### **IV. Acknowledgements Page(s)**

Any acknowledgements to individuals, other NYSBA Committees/Task Forces/Sections or other organizations that assisted with the report can be included here.

Acknowledgements can be in list or paragraph form.

## **V. Introduction**

This section sets the stage for the report - telling the story briefly of why the work came to be. It should be no longer than 2 pages. Information to include:

- What is the problem being addressed.
- Background and history of the NYSBA entity formed to address the issue, including when it was formed.
- Explain the mission of the NYSBA entity drafting the report.
- Describe the scope of the report.

If an interim report was previously presented, include background on the interim report, such as when it was presented and the summary of its content.

## **VI. Executive Summary**

This section gives a snapshot of your report to the audience. If the reader does not read any further, the reader should be able to know these three things: (1) an overview of your findings, (2) what the recommendations are to address the issue(s) and (3) why the report and recommendations should be adopted. This section should be no longer than 3 - 4 pages. To that end, this section should:

- Summarize your findings.
- List in bullet form the recommendations to be adopted.
- If a resolution is being submitted, briefly summarize the resolution.
- Describe how the recommendations will be implemented.
- Identify any opposition to the recommendations.

## **VII. Background**

This section explains why the problem or issue exists. Flush out the legal and historical background for the issue(s) being addressed in the report. Sources of this information include, if pertinent:

- Summaries of legislation and laws
- Legislative reports
- Data/Analytics - survey results, focus groups, etc.
- Historical accounts
- Prior NYSBA Reports
- Prior NYSBA Resolutions
- Reports from other bar associations
- Any other relevant research that assists in describing why the issue exists.

## **VIII. Analysis and Presentation of Recommendations**

In this section, you are analyzing the background to support the recommendations to address the issue(s). Provide detailed recommendations and explain why they will address, minimize or resolve the issue. [be sure to note which of the recommendations the House of Delegates and/or Executive Committee will be asked to adopt and/or if the recommendations require NYSBA action/involvement.] When drafting your recommendations, please keep in mind the following:

- Draft recommendations that are specific and actionable by the Association (ie. a recommendation that can be implemented by the Association via a NYSBA entity, legislative advocacy, a recommendation to OCA action or other government agency).
- Prioritize your recommendations: include those that will have the most impact on addressing the issue(s).
- Keep the number of recommendations to a number between 10 and 15 so the Association can take meaningful action on addressing the issue(s).
- Place recommendations beyond 15 into an omnibus recommendations for future consideration by the Association.
- Include any citations as footnotes with hyperlinks to sources in the citations.

## **IX. Conclusion**

This section clearly and concisely summarizes what has been presented in the report. Restate the topic being presented and why it is important, summarize key arguments/findings, and provide a short discussion of the implications of the report.

## **X. Glossary / Index**

The section may be needed including the following situations:

- Glossary: The report contains several terms that require explanation.
- Index: The report has many sources of information that you want easily available for the reader.

## Examples from Approved NYSBA Reports

### I. Acknowledgment Page(s)

- [Report and Recommendations of the New York State Bar Association Task Force on Advancing Diversity](#) (page 2).
- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (page 1).
- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (page 3).

### II. Introduction

- [Report and Recommendations of the New York State Bar Association Task Force on Modernization of Criminal Practice](#) (page 2).
- [Report and Recommendations of the Committee on Families and the Law Racial Justice and Child Welfare](#) (pages 6-8).

### III. Executive Summary

- [Report and Recommendations of the New York State Bar Association Task Force on Mental Health and Trauma Informed Representation](#) (pages 10-24).
- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (pages 3-9).

### IV. Background

- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (pages 9-66).
- [Report and Recommendations of the Committee on Families and the Law Racial Justice and Child Welfare](#) (pages 8-24).

### V. Analysis and Presentation of Recommendations

- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (pages 66-105).
- [Report and Recommendations of the Task Force on Nursing Homes and Long-Term Care](#) (pages 111-122).

### VI. Conclusion

- [Report and Recommendations of the New York State Bar Association Task Force on Racism, Social Equity, and the Law](#) (page 105).
- [Report and Recommendations of the New York State Bar Association Task Force on Mental Health and Trauma Informed Representation](#) (pages 125-126).

### VII. Glossary / Index

- [Report and Recommendations of the Special Committee on Collateral Consequences of Criminal Proceedings](#) (pages 25-27).