CLE Coordinator Playbook for Program Planning

June 2019

"[The coordinator playbook is] a wonderful tool jam-packed with helpful information. Thank you! Not a page is wasted."
Rocky Martinez, CLE Coordinator, 2018-19

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

The Best CLE to Enhance Professionalism and to Promote the Successful Practice of ISBA Members

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CLE Coordinator Role and Benefits

ISBA CLE Coordinator – Volunteer Position Description

SUMMARY OF RESPONSIBILITIES

Upon appointment by the chair of a section or committee, the ISBA CLE Coordinator serves voluntarily as the lead coordinator for the CLE programming of that section or committee for the term of the bar year, July 1 – June 30. The CLE Coordinator is responsible for all section or committee programming, whether presented live onsite or via live and on-demand electronic media.

PRIMARY RESPONSIBILITIES

- At the beginning of the bar year:
    - Review the Annual CLE Committee report with the CLE Committee liaison which includes the section or committee's CLE history, master CLE curriculum calendar with upcoming assigned dates, past program evaluations and more
    - Take an ISBA Online CLE program to understand the experience of our members, since 80% of ISBA CLE hours are delivered online
    - Review all ISBA Online CLE content for your subject area and expirations dates (2 years after presented) to identify deficits and plan programming to fill those deficits
    - Identify any of your section or committee Online CLE programs with accreditation expirations dates that should be extended because the content is still current and beneficial for viewing and request an accreditation extension via the form at www.isba.org/cle/coordinators
- Plan and formally propose the number of CLE programs requested by the CLE committee for the section or committee you represent, including the requested number of webcasts or webinars
- Submit proposals by the CLE deadlines occurring during the bar year for which you are appointed
- Work closely with the section council or committee you represent to selects topics, develop topic descriptions, recruit quality speakers, communicate requirements to speakers, and help ensure quality written materials are submitted by the deadline
- Encourage speakers to take advantage of ISBA's faculty development resources
- Utilize knowledge of the educational needs of lawyers to construct proposals for programming to ensure ISBA's CLE offerings remain of maximum benefit to Illinois practitioners
- Facilitate and coordinate the implementation of programs approved by the committee through cooperative work with ISBA staff who support administration of the programs
- Serve as Moderator for programs coordinated or recruit others to moderate
- Incorporate interactivity in live CLE programs to engage the audience

Coordinating an ISBA Law Ed Program

By coordinating a CLE program, you will . . .

1. Connect with authorities in your field, especially with the section council or committee members you work with to coordinate the program
2. Receive complimentary attendance and MCLE credit at the CLE program you plan
3. Have an opportunity to moderate the program and improve your own public speaking skills
4. Improve your leadership skills which often leads to opportunities for other leadership roles in ISBA and other professional organizations
5. Expand your professional network by meeting speakers, attendees and even online viewers who may connect with you after viewing the program in the online CLE archives (good source of referrals)
6. Give back to the profession by providing legal education for your colleagues
7. Get your questions answered on topics of interest
8. Increase your knowledge in your practice area
9. Get support from the CLE committee, other CLE coordinators in the Online Coordinator community, and ISBA CLE staff throughout the process! We make it easy for you!

Access all the information you need to plan a program, as well as program proposal forms at www.isba.org/cle/coordinators

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Coordinator Planning Information

a. Programming Expectations
b. CLE Coordinator Checklist for Successful Programming
c. Example Program Proposals
   Live Onsite Program – Full or Half Day
   Webcast or Webinar
d. Developing and Incorporating Polling Questions
e. Table Clinics Options and Templates
f. Planning Panel Presentations
g. On-Demand CLE Catalog - Topic Review
h. Online CLE Accreditation Extension Request
i. Faculty Recruitment Flyer
j. Spring 2019 CLE Calender

NEW!

Minimum CLE Programming Hours Requested for the On-Demand Catalog

Know Your Winning CLE Number!
2, 5, 10, or 20 hours

The Standing Committee on CLE is asking sections to produce a minimum number of hours for the on-demand CLE catalog this year, based on section size, rather than the traditional request for a set number of live on-site events or webcast/webinar events. With 83% of our hours viewed online last year, our members want more content in the electronic format.

Be sure to have 1 – 3 hours of Practice Ready basics content in the on-demand catalog at all times!

Practice Ready SERIES

Check with your CLE Committee Liaison for the number requested for your section or committee and for more details!

Section & Committee Annual CLE Programming Expectations – FY 2019-20
Requested Minimum Number of CLE Hours to be Produced for On-Demand Catalog

Sections

Requested Hours are based on historical practice and "active" dues paying membership size:

- 1501 and up - **20** hours, including "practice ready" basics content
- 701-1500 – **10** hours, including "practice ready" basics content
- 251 – 700 – **5** hours, including "practice ready" basics content
- 250 or less – **2** hours, including "practice ready" basics content

Please review the ISBA On-Demand CLE Catalog to ensure you have "practice ready" basics content available at all times, to identify missing topics, and to avoid duplicate topics.

Section	Requested Hours of CLE Content to Produce for On-Demand Catalog	"PRACTICE READY" BASICS CLE INITIATIVE *The hours below will count toward your requested hours of CLE content.* Please include:
Administrative Law	**2**	**1** hour basics
Agricultural Law	**5**	**1** hour basics
Alternative Dispute Resolution	**2**	**1** hour basics
Animal Law	**2**	**1** hour basics
Bench and Bar	**5**	**1** hours basics
Business Advice, Collections, & Financial Planning	**5**	**1** hour basics
Business & Securities Law	**5**	**1** hours basics
Child Law	**2**	**1** hour basics
Civil Practice & Procedure	**20**	**3** hours basics

Commercial Banking, Collections, & Bankruptcy	**5**	**2** hours basics
Construction Law	**2**	**1** hour basics
Corporate Law Departments	**5**	**1** hour basics
Criminal Justice	**10**	**2** hours basics
Education Law	**2**	**1** hour basics
Elder Law	**5**	**1** hours basics
Employee Benefits	**2**	**1** hour basics
Energy Utilities Trans & Tele	**2**	**1** hour basics
Environmental Law	**5**	**1** hour basics
Family Law	**20**	**3** hours basics
Federal Civil Practice	**5**	**1** hour basics
Federal Taxation	**5**	**1** hours basics
General Practice, Solo/Small Firm	**5**	**1** hours basics
Health Care	**5**	**1** hour basics
Human Rights	**2**	**1** hour basics
Insurance Law	**5**	**1** hours basics
Intellectual Property	**5**	**1** hour basics
International & Immigration Law	**2**	**1** hour basics
Labor & Employment Law	**10**	**2** hours basics
Local Government Law	**5**	**1** hour basics
Mineral Law	**2**	**1** hour basics
Privacy & Information Security Law	**5**	**1** hour basics
Real Estate	**20**	**3** hours basics
Senior Lawyers	**2**	**1** hour basics
State & Local Taxation	**5**	**1** hours basics
Tort Law	**10**	**2** hours basics
Traffic Laws & Courts	**10**	**2** hours basics
Trusts & Estates	**20**	**3** hours basics
Workers' Compensation	**10**	**1** hours basics
Young Lawyers Division	**20**	**3** hours basics

Committees

Committee	Requested Hours of CLE Content for CLE On-Demand Catalog
Committee on ARDC	**2**
Committee on Corrections & Sentencing	**5**
Standing Committee on Delivery of Legal Services	**5**
Committee on Government Lawyers	**5**
Committee on Law Office Management & Economics	**5**
Committee on Legal Technology	**5**
Committee on Mental Health Law	**5**
Committee on Military Affairs	**5**
Committee on Racial & Ethnic Minorities	**5**
Committee on Sexual Orientation & Gender Identity	**5**
Standing Committee on Women & the Law	**5**

Co-sponsorship is encouraged, but hours produced will count only for the lead co-sponsoring section or committee.

Note, if you have previously recorded programs that are still current and relevant, you may ask for an accreditation extension beyond the original two years in lieu of recording a new program. However, the extended program hours will not count toward the hours of new programming requested above. See extension request form on ISBA CLE coordinator webpage – www.isba.org/cle/coordinators

Webcasts and webinars are encouraged as a way to address "hot topics" and a way to capture high quality programming for the popular on-demand CLE catalog where over 80% of ISBA CLE hours are delivered.

Section Council Active* Membership Counts - As of 4/30/2019

Section Name	Total	
Administrative Law	173	
Agricultural Law	230	
Alternative Dispute Resolution	214	
Animal Law	96	
Bench & Bar	200	
Bus. Adv. & Fin. Plnng	355	
Business & Securities	504	
Child Law	217	
Civil Practice	1,718	
Commercial Banking	614	
Construction Law	237	
Corporate Law Dept.	336	
Criminal Justice	739	
Education Law	206	
Elder Law	559	
Employee Benefits	153	
Energy, Utilities, Transportation & Telecommunications	90	
Environmental Law	192	
Family Law	1,617	
Federal Civil Practice	262	
Federal Tax	318	
General Practice	639	
Health Care	344	
Human Rights	89	
Insurance Law	437	
Intellectual Property	307	
International Law	182	
Labor & Employment	712	
Law Office Management and Economics	217	
Legal Technology	220	
Local Government	453	
Mental Health Law	111	
Mineral Law	64	
Privacy & Information Security Law	518	
Real Estate	1,810	
Senior Lawyers	0	
State & Local Tax	278	
Tort Law	1,042	
Traffic Laws & Courts	482	
Trusts & Estates	1,709	
Workers' Compensation	617	
Young Lawyers Division	9,493	(all comp members)

*Active membership is the dues paying membership size

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CLE Coordinator Checklist
For
Successful Programming

Program Composition

Did you . . .

- ☐ …identify the number and types of programs requested by the CLE committee for your section or committee this year?
- ☐ … identify program "learning objectives" such as "What will the attendees take away?" and "Why should they attend this program?"
- ☐ …identify the type of practitioners and level of practice for the program's target audience?
- ☐ …select a presentation format?
  - Live onsite - a half-day (3.5+ hours) or a full-day (6+ hours)
  - Webcast - live video streamed from the ISBA Chicago Regional Office for viewers watching remotely via computer with Internet connection
  - Webinar – live audio and slides only, presented from any location for viewers listening to audio and viewing the slides via computer with Internet connection
- ☐ …schedule topics in quarter-hour increments, except introductory and closing remarks, which are not creditable?
- ☐ …schedule an identifiable segment of Professional Responsibility credit, if included, of at least 1 hour for full-day programs and at least 30 minutes for half-day program?
- ☐ …incorporate question and answer time into each session rather than ending the program with Q&A? (ISBA must make sure the full advertised MCLE credit time is provided.)
- ☐ …include at least one 15 minute break for half-day, onsite programs and two 15 minute breaks for full-day, onsite programs; allow a minimum of 30 minutes for a lunch break at full-day programs?
  - Please make a note on your proposed agenda if you would like ISBA to provide lunch for the program at an additional cost per attendee, added to the registration fee
- ☐ …contact the ISBA staff CLE Program Coordinator for available dates on the CLE Curriculum Calendar before recruiting speakers and submitting your proposal?

Faculty Recruitment

Did you . . .

- ☐ …recruit the best available speakers for each topic, whether or not they serve on the section or committee?
- ☐ …recruit speakers who reflect the geographic, ethnic, and gender diversity of the bar association?
- ☐ …recruit only speakers who will agree to be videotaped and who will sign the required Presentation Agreement?
- ☐ …notify speakers that materials are due 4 weeks prior to the program and confirm their agreement to submit materials on time?
- ☐ …recruit in-state speakers or provide written justification for selection of an out-of-state speaker? (Note, out-of-state speakers are subject to the same reimbursement as in-state speakers)
- ☐ …recruit speakers who are ISBA Members or, in the case of non-members, invite them to join and direct them to the ISBA membership webpage at: https://www.isba.org/membership/join?
- ☐ …limit the number of speakers, when possible, by selecting only the number necessary to provide a cohesive and professional program?
- ☐ …remind speakers of ISBA faculty resources available at www.isba.org/cle/faculty?

Moderator Selection

Did you . . .

- ☐ …select a moderator who will keep the program running on time, capture audience questions via microphone, and assist presenters during the program?
- ☐ …select one moderator for a half-day program and up to two moderators for a full-day program?
- ☐ …recruit local moderators, if possible?
- ☐ ….identify a moderator who is an ISBA member and a sponsoring section or committee member, preferably with Law Ed experience?
    - CLE Coordinators, Chairs, and speakers are recommended

Proposal Submission

Did you . . .

- ☐ …use the correct proposal form for your program type?
    - Forms are online at: https://www.isba.org/cle/coordinators
- ☐ …contact your CLE Committee Liaison or ISBA staff if you have any questions about the proposal submission requirements prior to submitting?
- ☐ …confirm all speakers before submitting the program proposal and include all contact information for each speaker and moderator: name, address, phone number, and email address?

☐ …provide two to three sentence descriptions for each session, including what the attendees will learn?

☐ …submit your fully completed proposal form and agenda to ISBA staff by the proposal deadline?

☐ …know that if your program agenda is lacking sufficient information to market and price the program by six weeks prior to the presentation date, ISBA reserves the right to postpone or reschedule the presentation date and may require resubmission of the proposal to the CLE committee

Following Program Approval

Did you . . .

☐ …schedule a telephone conference 7-8 weeks prior to the program for all presenters, the moderator, and yourself to confirm topics, reinforce materials deadlines, plan panel discussions and address questions?

- Contact ISBA staff if you would like assistance in providing you with telephone conference capabilities for your pre-program conference

☐ …approve the agenda formatted by ISBA staff for promotional purposes?

- Promotions will be distributed only after final approval from the CLE Coordinator

☐ …assist ISBA staff in contacting speakers for materials, if requested?

☐ …notify ISBA staff immediately of any speaker cancellations and replacements prior to the program?

☐ …know ISBA staff will secure all venues, order refreshments, send speaker packets, collect materials, assist with AV needs, provide onsite coordination, collect and tabulate evaluations, send speaker thank you letters and produce and publish programs in the ISBA Online CLE archives?

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LIVE ONSITE PROGRAM*

2018-19 Program Proposal
Illinois State Bar Association

Complete proposal forms must accompany all proposals.

**Live onsite at any location. Live onsite in Chicago office has the option of simultaneous live webcast*

Submission Deadlines –– Presentation Periods:

7/15	**Dec./Jan**
9/15	**Feb./March**
11/15	**April/May**
1/15	**June**
3/15	**Sept.**
5/15	**Oct. /Nov.**

Form is also available at:
www.isba.org/cle/coordinators

Please Submit a *Typed* Form

☐ **I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR.**

☒ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO INCLUDE AN ATTORNEY IN THEIR FIRST 10 YEARS OF PRACTICE AS A PRESENTER OR CO-PRESENTER AS A WAY TO TRAIN AND DEVELOP NEW ISBA LAW ED FACULTY MEMBERS.

A. **Presenting Section Council/Standing or Special Committee:** Committee on Legal Technology

B. **Co-sponsoring ISBA Section Council(s) or Committee(s)** *(Co-sponsors may but are not required to assist in planning or presenting, but co-sponsor section members will be entitled to pricing discounts, when available, and will be included in target marketing, so co-sponsorship offers many benefits)***:** _____

C. **Title of proposed program** *(keep it short, simple, and catchy)***:** Legal Technology 101

D. **Person(s) submitting proposal** *(Name, address, telephone number, e-mail address, and section)***:**

Aaron W. Brooks
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

E. **Requested Program:**

☐ **Live onsite program only**

☒ **Live onsite program in ISBA Chicago office with simultaneous live webcast** *(Please Note: It is imperative that speakers follow the material submission deadlines in order to ensure that live webcast attendees have access to the course materials. Handouts brought to the live, onsite program will not benefit attendees attending remotely.)*

F. **Requested Location and Date(s) For Live Onsite Programs *(Please confirm with ISBA staff if your section has a previously scheduled program date)*:**

☒ **Chicago Only; Date(s):** May 23, 2019

☐ **Chicago & Other Location within State** *(indicate preferred location(s), if any, and date(s))* _____

☐ **Other Location within State** *(indicate preferred location, if any, and date(s))* _____

G. Program Length:
(To have a live onsite audience, the program must be at least a half-day in length. Shorter programs will be live webcasts or live webinars for remote audiences and ISBA archives.)

☒ **All day** *(9:00 a.m. to at least 4:00 p.m.)*
☐ **Half day** *(at least 3.5 hours)*

H. Segment Length: ☒ I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks.

I. Professional Responsibility MCLE credit, if included: PMCLE topics *(professionalism, civility, legal ethics, diversity and inclusion, or mental health and substance abuse)* **must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours:**

_____ **Diversity and Inclusion** (for the legal profession)
_____ **Mental Health and Substance Abuse** (affecting lawyers)
5.5 **Professionalism, Civility, or Legal Ethics**

J. Financial Contributors: ☐ I have secured financial contributors for this program and have reviewed and followed the guidelines of ISBA's Financial Contributor Policy. Financial Contributor's Name(s) for publicity, address, phone, email, and amount pledged: _____

K. Pre-Program Teleconference: ☒ (optional) I intend to lead a pre-program planning telephone conference for all presenters no later than 7 – 8 weeks prior to the program date. ~~I request ISBA assistance with telephone conference capabilities~~. (*preferred telephone conference date or week:* _____)

L. Publications (optional): Please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process._____

MARKETING THE PROGRAM

For ISBA marketing purposes please indicate which of the following groups might be interested in this program:

ISBA Sections

☐ Administrative Law
☐ Agricultural Law
☐ Alternative Dispute Resolution
☐ Animal Law
☐ Bench & Bar
☐ Business Advice & Financial Planning
☐ Child Law
☐ Civil Practice
☐ Commercial Banking, Collections & Bankruptcy
☐ Construction Law
☐ Corporation Securities & Business
☐ Corporate Law Department
☐ Criminal Justice
☐ Education Law
☐ Elder Law
☐ Employee Benefits
☐ Energy, Utilities, Transp. & Telecomm.
☐ Environmental Law
☐ Family Law
☐ Federal Civil Practice
☐ Federal Tax
☐ General Practice/Solo & Small Firm
☐ Health Care
☐ Human Rights
☐ Insurance Law
☐ Intellectual Property
☐ International & Immigration Law
☐ Labor & Employment
☐ Local Government
☐ Mental Health Law
☐ Mineral Law
☐ Real Estate
☐ Senior Lawyers
☐ State & Local Tax

☐ Tort Law
☐ Traffic Laws & Courts
☐ Trusts & Estates
☐ Workers' Compensation
☐ Young Lawyers

ISBA Committees

☐ ARDC
☐ Corrections and Sentencing
☐ Delivery of Legal Services
☐ Disability Law
☐ Government Lawyers
☐ Law Office Management & Economics
☐ Legal Technology
☐ Military Affairs
☐ Racial and Ethnic Minorities
☐ Sexual Orientation and Gender Identity
☐ Women and the Law
☒ Other This is a program of general applicability to all professionals who use Microsoft and PDF technology, or who have concerns about the use of cloud based applications or legal technology ethics issues.

☒ **Certified Public Accountants*** ***(*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)***
☐ **Other Organizations/Agencies**_____

ISBA Law Ed LIVE ONSITE* Program Agenda Template

**Live onsite at any location or live onsite in Chicago office with simultaneous live webcast.*
(Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

Program Title: Legal Technology 101

Sponsoring Section: Committee on Legal Technology

To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)
This is a program of general applicability to all professionals who use Microsoft and PDF technology, or who have concerns about the use of cloud based applications or legal technology ethics issues.

_____

To what level of practice experience is this program directed?

☒ Basic ☐ Intermediate ☐ Advanced

Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?
This program addresses the basic technology tools that lawyers use on a daily basis. The major emphasis is upon the core Microsoft Office applications (Word, Outlook, Powerpoint and Excel), PDF files, cloud applications, and ethics of technology.

_____

Lead Coordinator Name, Address, Telephone Number, E-mail Address: *(Complimentary program registration is provided for one coordinator.)*
Aaron W. Brooks

On-Site Program Moderator *(Please Note: In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs.* ***Any additional moderators or coordinators can attend the program for $25.*** *Please indicate the moderator receiving travel/hotel reimbursement:_____0_____ and moderator(s) receiving complimentary registration 0*

Moderator Name, Addresses, Telephone Number, E-mail Address

Aaron Brooks
ABC Law Firm
123 Street Name Rd.
City, IL 12345

123-456-7890
Sample@email.com

Speaker Recruitment

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

- **Speaker will agree to submit materials and Power Point *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
- **Speaker will agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Speaker agrees to arrive not less than 30 minutes prior to presenting**
- **Speaker is an ISBA Member or I will invite the presenter to join ISBA** (http://www.isba.org/membership/join)
- **Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement**
- **Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf**
- **Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty**
- **If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters**

Directions for Preparing the Program Agenda and Submitting Program Proposal

When drafting the Program Agenda,
include the following information for each segment topic:
Please attach additional pages for each segment as needed.

- ✓ **Topic Title** See Attached Agenda
- ✓ **Topic Length** *(in 15-minute increments only)*_____
- ✓ **Topic Description** *(2-3 sentences)* _____
- ✓ **Presenter Name, Address, Telephone Number (cell and office), & E-mail Address** _____
- ✓ ***(optional)* One web address to link from the ISBA program webpage to the speaker's biographical information or firm website** _____
- ✓ **If using out-of-state presenters, please include justification:** _____

Please attach your Program Agenda to this completed Form.
Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:
CLE Department, Attn: Janean Goby
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701

Fax: (217) 525-0712 e-mail: jgoby@isba.org

Thank you for your proposal!

COORDINATORS:
Please distribute the following page to each of your speakers so they will know what to expect from ISBA and what ISBA needs from them. This form can also be found online at:
www.isba.org/cle/coordinators

THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

What you can expect:

- **Contact from the ISBA CLE Coordinator to confirm the dates and times for your presentation**
- **Contact from the ISBA CLE Department regarding deadlines and program information**
- **Publicity for you and your firm in ISBA brochures, marketing emails, and/or color flyers, as well as on our website and in the course materials**
- **A speaker invitation letter that you can use to invite all your peers to the program**
- **Complimentary preparation time MCLE credit at 6 times your actual presentation time**
- **Complimentary registration to the program at which you are speaking**

What ISBA Expects:

- **Your agreement to submit written materials, legal forms, and/or PowerPoint presentation at least *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
- **Your agreement to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Your agreement to arrive not less than 30 minutes prior to presenting**
- **Your membership in ISBA – or consideration to join ISBA (http://www.isba.org/membership/join)**
- **Your agreement to be videotaped by submitting a signed ISBA presentation agreement**
- **Your agreement to review the Checklist for Professional Responsibility topic presentations if you are presenting a segment that qualifies for PMCLE credit (www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf)**
- **Your review and completion of all or part of ISBA's Faculty Development Series (www.isba.org/cle/faculty)**
- **Your agreement to comply with the ISBA travel reimbursement guidelines and limitations**

Illinois State Bar Association | Committee on Legal Technology
Legal Technology 101
May 23, 2019

8:30 – 8:45
Opening and Welcome Remarks

Aaron W. Brooks, Moderator
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

8:45 – 9:30 a.m. **Essentials of Microsoft Word**
Microsoft Word has become a fundamental tool within the practice of law. This presentation will provide a basic overview of how to use Word, together will several practical tips and tricks to make your document drafting go more quickly and smoothly. The presentation will cover features such as automatic paragraph numbering and formatting, page numbering, tables of contents, redlining, metadata, and more.

Matthew Loar
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

9:30 – 10:15 a.m. **The Basics of Document Assembly Software**
Document assembly software is a powerful tool that lawyers can use to streamline many routine document drafting tasks. This presentation will discuss and compare two popular platforms: IllinoisBarDocs and Pathagoras. The presenter will provide a live demonstration to show how document automation can significantly improve accuracy and productivity when drafting routine documents and letters.

Trent L. Bush
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

10:15 – 10:30 a.m. Break (beverages provided)

10:30 – 11:15 a.m. **PDF Essentials: What Lawyers Need to Know and Why**
PDF is the file format of choice when exchanging documents with clients, other lawyers, and the courts. Because of this prevalence, lawyers must understand the uses, risks and benefits of PDF files. This session covers how to work with PDF files, including metadata removal, document security, redaction, Bates numbering, collaboration features, as well as the pros and cons of the different PDF applications.

Nerino Petro
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

11:15 – 12:00 p.m. **Understanding Cloud Technology**
The term "cloud" may be the most frequently used term in legal technology discussions today, but attorneys are sometimes confused about what it means and how it works. This presentation will provide a basic and systematic understanding of cloud technology, together with several tips and suggestions about how to set up and use many popular cloud-based applications and platforms.

Aaron W. Brooks
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Lunch 12:00 – 1:00 p.m. (lunch provided)

1:00 – 1:45 p.m. **Getting the Most from Microsoft Outlook**
It's tempting to think of email as a necessary evil. It can be an effective communications tool, but getting control over it is often an exercise in frustration. Why not make Microsoft Outlook work for you? In this session, you'll learn strategies and techniques for powering through your email, as well as the features, security settings, and add-ins that will bring you closer to that elusive state of email nirvana.

Bryan Sims
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

1:45 – 2:45 p.m. **The Ethics of Technology**
The Illinois Rules of Professional Conduct recognize that part of a lawyer's duty to maintain competence includes keeping abreast of the benefits and risks associated with relevant technology. This presentation will explore this ethics requirement, and provide an overview of what attorneys must do in order to comply. The presenter will focus specifically on computer security, cloud

technology, and other major current risks associated with the use of technology in the practice of law. This presentation can be distinguished from the many seminars out there on "cybersecurity" because it looks at the issue via a detailed discussion of the Illinois Rules of Professional Conduct and ISBA Professional Conduct Advisory Opinions about electronic information and security, and tries to provide a baseline for how best to interpret the standard of "reasonability" under these rules and opinions.

Jerome Larkin
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Aaron W. Brooks
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

2:45 – 3:00 p.m. Break (refreshments provided)

3:00 – 3:45 p.m. **The Overlooked Office Apps: PowerPoint and Excel**
If you're not using PowerPoint and Excel, you're missing out on two of the most useful applications of your Office suite. Todd Flaming will show how he uses PowerPoint for hearings, presentations, and diagram/graphic creation. He will show how he uses Excel for time and billing, accounting, and case budgets.

Todd Flaming
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

3:45 – 4:45 p.m. **60 Tips in 60 Minutes**
The best of legal technology, practice management, electronics and incredibly useful websites for lawyers. This rapid-fire, entertaining hour is full of great ideas you can immediately incorporate into your practice.

Todd Flaming
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Bryan Sims
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Nerino Petro
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Aaron W. Brooks
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

4:45 – 5:00 p.m. **Q & A with today's presenters**

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

*WEBCAST or WEBINAR PRESENTATIONS**

2018-19 Program Proposal
Illinois State Bar Association

Complete forms must accompany all proposals.

**NO ONSITE AUDIENCE.*

- *Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois.*
- *Webinars are slides and audio presented live from any location that has Internet and phone.*

Submission Deadlines* –– Recording Periods:

7/15	**Oct./Nov.**
9/15	**Dec./Jan.**
11/15	**Feb./March**
1/15	**April/May**
3/15	**June**
5/15	**Sept.**

*For "hot topics" you may request an expedited schedule for your recording date.

Form is also available at:
www.isba.org/cle/coordinators

Please Submit a *Typed* Form

☒ **I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR.**

☒ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO INCLUDE AN ATTORNEY IN THEIR FIRST 10 YEARS OF PRACTICE AS A PRESENTER OR CO-PRESENTER AS A WAY TO TRAIN AND DEVELOP NEW ISBA LAW ED FACULTY MEMBERS.

A. **Presenting Section Council/Standing or Special Committee:** Construction Law Section Council

B. **Co-sponsoring ISBA Section Council(s) or Committee(s)** *(Co-sponsors may but are not required to assist in planning or presenting, but co-sponsor section members will be entitled to pricing discounts, when available, and will be included in target marketing, so co-sponsorship offers many benefits)***:** _____

C. **Title of proposed program** *(keep it short, simple, and catchy!)***:** Is that covered?: Construction Project Risks and Requirements under AIA Documents

D. **Person(s) submitting proposal** *(Include name, address, telephone number, e-mail address, and section committee on which you serve)***:**

Geoffrey A. Bryce
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Justin L. Weisberg
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

E. **Requested Program Date(s)*:** March 27, 2019
Please Note: Webcasts and Webinars are presented on Wednesday and Thursdays.
If Hot Topic Expedited Date is Requested, Provide Justification _____

F. **Short Program Length, indicate time:** *(1-2 hours recommended)* 1.5 hours

G. ☒ **I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30 ,45, 60), except introductory and closing remarks.**

H. **Professional Responsibility MCLE credit, if included: PMCLE topics***(professionalism, civility, legal ethics, diversity and inclusion, or mental health and substance abuse)* **must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours:**

_____ **Diversity and Inclusion** *(for the legal profession)*
_____ **Mental Health and Substance Abuse** *(affecting lawyers)*
_____ **Professionalism, Civility, or Legal Ethics**

I. ☐ **Pre-Program Teleconference (optional): I intend to lead a pre-program planning telephone conference for all presenters no later than 7 – 8 weeks prior to the program date. I request ISBA assistance with telephone conference capabilities.** *(preferred telephone conference date or week:*_____)

J. ☐ **Publications (optional):** Please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process. _____

MARKETING THE PROGRAM

For ISBA marketing purposes please indicate which of the following groups might be interested in this program:

ISBA Sections

☐ Administrative Law
☐ Agricultural Law
☒ Alternative Dispute Resolution
☐ Animal Law
☐ Bench & Bar
☐ Business Advice & Financial Planning
☐ Child Law
☒ Civil Practice
☐ Commercial Banking, Collections & Bankruptcy
☒ Construction Law
☐ Corporation Securities & Business
☐ Corporate Law Department
☐ Criminal Justice
☐ Education Law
☐ Elder Law
☐ Employee Benefits
☐ Energy, Utilities, Transp. & Telecomm.
☐ Environmental Law
☐ Family Law
☐ Federal Civil Practice
☐ Federal Tax
☐ General Practice/Solo & Small Firm
☐ Health Care
☐ Human Rights
☒ Insurance Law
☐ Intellectual Property
☐ International & Immigration Law
☐ Labor & Employment
☐ Local Government
☐ Mental Health Law
☐ Mineral Law
☒ Real Estate
☐ Senior Lawyers
☐ State & Local Tax
☐ Tort Law
☐ Traffic Laws & Courts
☐ Trusts & Estates
☐ Workers' Compensation
☐ Young Lawyers

ISBA Committees

☐ ARDC
☐ Corrections and Sentencing
☐ Delivery of Legal Services
☐ Disability Law
☐ Government Lawyers
☐ Law Office Management & Economics

☐ Legal Technology
☐ Mental Health Law
☐ Military Affairs
☐ Racial and Ethnic Minorities
☐ Sexual Orientation and Gender Identity
☐ Women and the Law

☐ Other _____

☐ **Certified Public Accountants*** ***(*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)***
☐ **Other Organizations/Agencies**_____

ISBA Law Ed WEBCAST or WEBINAR PRESENTATION Program Agenda Template

**No onsite audience. Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois. Webinars are slides and audio presented live from any location that has Internet and phone capabilities.*

(Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

Program Title: Is that covered?: Construction Project Risks and Requirements under AIA Documents

Sponsoring Section: Construction Law Section Council

To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)
Insurance, construction, real estate transactional and litigation attorneys

To what level of practice experience is this program directed?
☐ Basic ☒ Intermediate ☐ Advanced

Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?
Attendees will be familiarized with the insurance requirements for Exhibit A to the AIA Family of Documents.

Lead Coordinator Name, Address, Telephone Number, E-mail Address: *(complimentary program registration is provided for one coordinator.)*
Steven D. Mroczkowski
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Program Moderator *(Please Note: In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs.* ***Any additional moderators or coordinators can attend the program for $25.*** *Please indicate the moderator receiving travel/hotel reimbursement:_____ and moderator(s) receiving complimentary registration*_____*

Interviewer/Moderator Name, Addresses, Telephone Number, E-mail Address
Speakers will be moderating

Speaker Recruitment

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

- **Speaker will agree to submit materials and Power Point *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
- **Speaker will agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Speaker agrees to arrive not less than 30 minutes prior to presenting**

- **Speaker is an ISBA Member or I will invite the presenter to join ISBA** (http://www.isba.org/membership/join)
- **Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement**
- **Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf**
- **Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty**
- **If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters**

Directions for Preparing the Program Agenda and Submitting Program Proposal

When drafting the Program Agenda,
include the following information for each segment topic:
Please attach additional pages for each segment as needed.

- ✓ **Topic Title** _____
- ✓ **Topic Length** *(in 15-minute increments only)* _____
- ✓ **Topic Description** *(2-3 sentences)* _____
- ✓ **Presenter/Panelist Name, Address, Telephone Number, & E-mail Address** _____
- ✓ ***(optional)*** **One web address to link from the ISBA program webpage to the speaker's biographical information or firm website** _____
- ✓ **If out-of-state presenter, please include justification:** _____

AGENDA

TITLE: Is that covered?: Construction Project Risks and Requirements under AIA Documents

GENERAL TOPIC: Insurance Requirements for Exhibit A to the AIA Family of Documents; this presentation will include a discussion of most, if not all, construction project related risks and the interplay and requirement of coverages under the AIA documents. The numerals below are self-explanatory in terms of content and each speaker will discuss the various coverages referenced below and how to obtain coverage consistent with commonly used construction contract documents. Each Increment below is 15 minutest. The below does not include a brief introduction and closing (about 5 minutes each). Speaker identification is as follows: Geoffrey A. Bryce (GAB; Justin L. Weisberg (JLW).

I. Builders Risk Coverages; Optional Extended Property Insurance; JLW

II. Loss of Use Business Interruption and Delay Incompletion Insurance; Ordinances or Law Insurance; GAB

III. Expediting Cost Insurance; Extra Expense Insurance; GAB

IV. Civil Authority Insurance; Ingress/Egress Insurance JLW

V. Soft Cost Insurance; Defective Workmanship Insurance JLW

VI. Comprehensive General Liability Insurance GAB

Speaker Contact

Geoffrey A. Bryce
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Justin L. Weisberg
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Please attach your Program Agenda to this completed Form.
Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:
CLE Department, Attn: Janean Goby
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 e-mail: jgoby@isba.org

Thank you for your proposal!

COORDINATORS:
Please distribute the following page to each of your speakers so they will know what to expect from ISBA and what ISBA needs from them. This form can also be found online at:
www.isba.org/cle/coordinators

Developing & Incorporating Polling Questions

BENEFITS

- Has a proven positive effect on comprehension and retention
- Provides valuable feedback from your audience
- Encourages participation and facilitates discussion
- Keeps the audience engaged

HOW TO INCORPORATE POLLING IN YOUR POWERPOINT

- Prepare your PowerPoint presentation
- Go through it and brainstorm questions you could ask your audience
- Insert questions into your Power Point on a regular PPT slide
- List the answer choices you want to give

POLLING YOUR AUDIENCE USING POLL EVERYWHERE

- ISBA has an account for this online polling software
- Audience members text their response via smart phone or submit it online
- Allows for an unlimited number of responses and attendees
- May only generate responses from more "tech savvy" audience members
- Results display on screen
- Answers are anonymous

It is imperative that the PowerPoint with polling questions requested be submitted to ISBA staff four weeks before the program, by the materials deadline.

Instructions on how to use the polling system will be provided to the moderator, speaker, and attendees.

Audience Engagement Polling Participant Instructions

Texting Your Vote via Your Smart Phone

- When the first polling slide in the presentation appears on screen, use your cell phone to text the code “isbacle” to the number 22333
- You will receive an auto response text confirming that you’ve joined the session
- As the speaker advances to each polling slide simply text the letter answer choice to 22333 each time
- Results will display on screen in real time
- Answers are anonymous

TABLE CLINIC OPTIONS AND BENEFITS

1. TABLE CLINIC PRESENTATION FORMAT

Speakers are assigned to tables/rooms where they share their top tips and answer attendee's specific questions on defined topics. Attendees switch tables/rooms at regular intervals.

2. TABLE CLINIC LIVE PROGRAM BENEFITS

- Interactive program for attendees and faculty
- Provides a way to incorporate and develop new faculty members by pairing experienced faculty and new attorneys at each table topic
- Attendees stay engaged and have more opportunity to ask questions and get answers

2. TABLE CLINICS WITH VIDEOS FILMED AFTER THE TABLE CLINICS

After the live table clinic presenters prepare a video script based on the Q and A and schedule filming after the program. The table clinics will not be taped, they are preparation for the video. The video recording session will not have a live audience, but will be a straight to film production.

- The ISBA needs quality instructional CLE on its website. One way of ensuring quality CLE is preparation and organization prior to filming.
- Because the faculty first presents the topic as a substantive table clinic multiple times, the attendees' input will help the faculty identify the necessary scope of the video
- Materials are better because the presenters are required to prepare substantial substantive materials sufficient for the attendees to review post seminar to equip attendees to competently and confidently take on the task at hand. The purpose of the substantial materials is two-fold: a) to give the attendees the materials as a thank you for participating and b) to primarily to ensure that the presenters have a serious head-start on the materials necessary for the how-to-video so they are prepared well in advance of filming.
- The table clinic sessions may not cover all of the materials submitted, in fact, based upon the questions of the individual attendees the clinics may each be a bit different.
- The actual table clinic lecture will be an outline based upon the substantial substantive materials which should last 10 minutes, with questions prompted or encouraged from the attendees the entire time; if no questions are forthcoming the new attorney panel member will pepper the presenters with questions. In this manner, the presenters will know what the attendees need to know, or what confuses the attendees so they may address the same in their comprehensive how-to-video.

SAMPLE AGENDA TEMPLATE

_____ LAW TABLE CLINIC SERIES

Presented by the ISBA _____Section

Don't miss ISBA's _____Law Table Clinic Series!

Join us as our speakers lead interactive discussions on a number of key _____ law topics, including …
This interactive innovative CLE format gives you ample opportunity to ask questions, clarify issues, and discuss concerns with faculty members during each presentation. Each table clinic lasts 30 minutes with attendees moving from table to table throughout the day. The series is open to all levels of practice experience, but designed with _____attorneys in mind.

Program Coordinator/Moderator:
***Name**, Firm, City*

Two Hours 15 minutes for four topics/One Hour 45 Minutes for three topics

Table Clinics: Round One (30 minutes per topic plus a 5 minute break to change rooms after each 30 minute session)

- **Topic One - Room A**
  Speaker Panel – Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Two – Room B**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions Speaker Panel
- **Topic Three – Room C**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Four – if a big crowd is expected – Room D**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions

10:40 – 10:50 a.m. Break *(refreshments provided)*

Two Hours 15 minutes for four topics/One Hour 45 Minutes for three topics

Table Clinics: Round Two (30 minutes per topic plus a 5 minute break to change rooms after each 30 minute session)

- **Topic One - Room A**
  Speaker Panel – Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Two – Room B**

Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions Speaker Panel

- **Topic Three – Room C**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Four – if a big crowd is expected – Room D**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions

30 Minutes - Lunch (provided)
Two Hours 15 minutes for four topics/One Hour 45 Minutes for three topics

Table Clinics: Round Three (30 minutes per topic plus a 5 minute break to change rooms after each 30 minute session)

- **Topic One - Room A**
  Speaker Panel – Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Two – Room B**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions Speaker Panel
- **Topic Three – Room C**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions
- **Topic Four – if a big crowd is expected – Room D**
  Recommended - Two Experienced with Two New Attorneys assigned to ask questions and take notes of the questions and discussions

PLANNING TEMPLATE for a Dynamic CLE Program – (Title)
Date, time, place, panelists

Time	Topic/Questions	Faculty Speaker	Slides	Added Comments By
9:00 am	Introduction of panelists and objectives	AB	1-2	
	Topic	CD	3-5	EF
	Topic			
	Topic			
	Audience Brainstorm			
	Topic			
	Audience problem-solving exercise (pairs or small groups) Panelists sample solutions and respond			
	Topic			
	Summary			
	Audience Questions			

Panel Planning Sheet to be used with "Dynamic CLE Panel Sessions" by David Cruickshank of Edge International.
You may use this template with acknowledgement of
David.Cruickshank@edgeinternational.com

ISBA Section & Committee Review of Online CLE Topics
To Identify and Program for Missing Topics

To ensure that the ISBA Online CLE catalog, used to provide more than 80 % of ISBA MCLE hours, is comprehensive and relevant for our members, the CLE Committee is requesting that CLE coordinators and their section council or committee members actively engage as follows.

1. CLE Coordinators, Section Council and Committee leaders should each take an ISBA Free Online CLE course to understand the process

2. By the first business meeting after annual meeting, CLE Coordinators and their section or committee should:

    a. Review the Top 50 list and any other section sponsored CLE in the On-Demand CLE catalog. www.isba.org/cle/on-demand

    b. Determine programming deficits in the On-Demand CLE catalog;

    c. Plan programs for the upcoming year to fill any deficits;

    d. View and determine which of their section sponsored online CLE programs may have relevant, non-expired content and complete a request form for ISBA staff to extend the accreditation by an additional period up to two years. *(Staff will provide full program agendas upon request)*

3. CLE coordinators should inform their CLE Committee liaison of their findings and programming plans prior to Midyear Meeting

Ways to Identify Current Online CLE Content for an ISBA Section or Committee

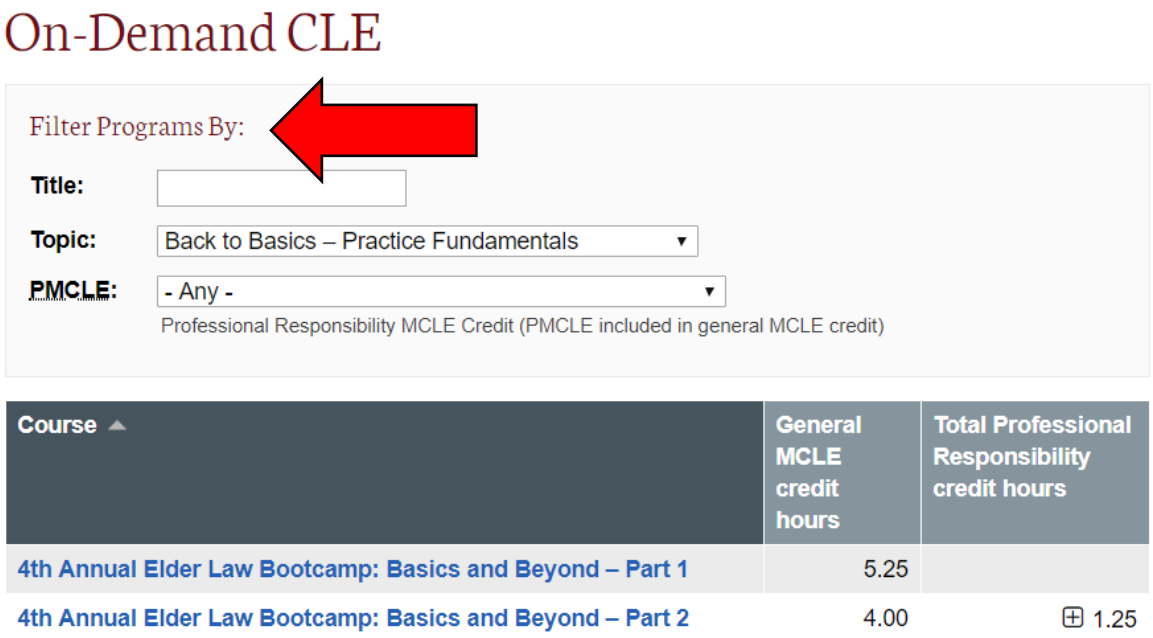
OPTION 1:

1. Go to www.isba.org/cle/coordinators and select the link to "current Online CLE programs":

2. Select your group from the list of section and committees at www.isba.org/cle/coordinators/programs and view current available content sponsored by that section or committee.

OPTION 2:

1. Use the search filters on the ISBA CLE On-Demand CLE page to search for all content related to your section or committee, not just programs sponsored by them. Search the basics and practice ready (coming soon) categories for back to basics programming. www.isba.org/cle/ondemand



ISBA Section/Committee Request to Extend Online CLE Program Accreditation Period

Program Title: _____

Sponsoring Section or Committee: _____

CLE Coordinator Making the Request: _____

Expiration Date Listed in ISBA Online CLE Catalog: _____
(*typically two years from original recording date)*

New Expiration Date Requested: _____
(up to two years from current expiration date)

Date Submitted: _____

SUBMIT THIS REQUEST:
Online at www.isba.org/cle/coordinators
Or to ISBA CLE Department, Attn: Ashley Van De Velde,
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 / Email: avandevelde@isba.org

WE WILL NOTIFY YOU WHEN THE EXTENSION IS COMPLETED.

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Interested in **JOINING** the ISBA Law Ed Faculty, **BOOSTING YOUR CAREER**, becoming known as an **AUTHORITY** on your topic, and earning **COMPLIMENTARY MCLE CREDIT** as an ISBA Law Ed presenter??

We Make It Easy to Get Involved!

Get started with any of the following options:

- Film a "Quick Takes for your Practice" short video www.isba.org/iln/quicktakesforyourpractice;
- Volunteer to assist an experienced speaker or panel presentation on a particular topic, do research for the topic, or just ask questions during the presentation to keep the dialogue flowing;
- Suggest a new topic for a Law Ed presentation and be matched with an experienced speaker; and/or
- Volunteer to help coordinate or plan a CLE program.

For more info, contact an ISBA CLE Committee Member
or an ISBA CLE Staff Member via email at:
speakerinfo@isba.org

January 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 New Year's Day	2	3	4
5	6	7	8	9	10	11
12	13	14 Available for webcast or webinar	15 Available for webcast or webinar	16 Available for webcast, webinar or half-day onsite	17 Available for half-day or full day onsite	18
19	20 Martin Luther Jr. Day	21 Quick Takes	22 Available for webcast or webinar	23 Available for webcast, webinar or half-day onsite	24 Available for half-day or full day onsite	25
26	27	28 Available for webcast or webinar	29 Mentoring Program Orientation	30 SALT CRO		

February 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4 Available for webcast or webinar	5 Quick Takes	6 Available for webcast, webinar or half-day onsite	7 Ag Law Bloomington Fed Tax CRO	8
9	10	11 Available for webcast or webinar	12 Lincoln's Birthday Available for webcast or webinar	13 ——Animal Law SIU——	14	15
16	17 President's Day Workers' Comp Full day CRO and O'Fallon	18 Available for webcast or webinar	19 Available for webcast or webinar	20 Available for webcast, webinar or half-day onsite	21 Available for half-day or full day onsite	22
23	24	25 Available for webcast or webinar	26 Ash Wednesday Available for webcast or webinar	27 Available for webcast, webinar or half-day onsite	28 Available for half-day or full day onsite	29

March 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3 Available for webcast or webinar	4 Available for webcast or webinar	5 Available for webcast, webinar or half-day onsite	6 Animal Law CRO	7
8	9	10 Available for webcast or webinar	11 Available for webcast or webinar	12 Available for webcast, webinar or half-day onsite	13 Available for half-day or full day onsite	14
15	16	17 Available for webcast or webinar	18 Quick Takes	19 Available for webcast, webinar or half-day onsite	20 Available for half-day or full day onsite	21
21	23	24 Available for webcast or webinar	25 Available for webcast or webinar	26 Available for webcast, webinar or half-day onsite	27 General Practice—Quincy	28
29	30	31 Available for webcast or webinar				

April 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 Available for webcast or webinar	2 Available for webcast, webinar or half-day onsite	3 Traffic Law	4
5	6	7 Available for webcast or webinar	8 Available for webcast or webinar	9 Available for webcast, webinar or half-day onsite	10 Good Friday—No CLE	11
12 Easter Sunday	13	14 Available for webcast or webinar	15 Tax Day Quick Takes—Springfield	16 Real Estate	17 Available for half-day or full day onsite	18
19	20	21 Available for webcast or webinar	22 Available for webcast or webinar	23 ——Elder Law——	24	25
26	28	29 Available for webcast or webinar	30 Available for webcast or webinar			

May 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5 Available for webcast or webinar	6 Available for webcast or webinar	7 Environmental Law	9	9
10	11	12 Available for webcast or webinar	13 Available for webcast or webinar	14 Available for webcast, webinar or half-day onsite	15 Available for half-day or full day onsite	16
17	18	19 Available for webcast or webinar	20 HOLD for Master Series speaker	21 Available for webcast, webinar or half-day onsite	22 Friday before Memorial Day—no CLE	23
24 31	25 Memorial Day Offices Closed	26	27 Available for webcast or webinar	28 Available for webcast, webinar or half-day onsite	29 Available for half-day or full day onsite	30

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2 Available for webcast or webinar	3 Available for webcast or webinar	4 Available for webcast, webinar or half-day onsite	5 Available for half-day or full day onsite	6
7	8	9 Available for webcast or webinar	10 Quick Takes	11 Available for webcast, webinar or half-day onsite	12 HOLD for Master Series speaker	13
14	15	16	17	18	19 ISBA Annual Meeting	20
21	22	23 Available for webcast or webinar	24 Available for webcast or webinar	25 Available for webcast, webinar or half-day onsite	26 HOLD for Master Series speaker	27
28	29	30 Available for webcast or webinar				

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Proposal Submission Requirements

a. Proposal Deadlines
b. Proposal Forms for Live Onsite Programs
c. Proposal Forms for Webcast and Webinar Programs

2019-2020 Deadlines

CLE Proposal Deadlines

CLE programs and speakers should be confirmed four to six months prior to the event, unless it is a hot topic that can be presented more quickly. In the FY19-20 term, please plan programs that will occur between December of 2019 and November of 2020. The proposal form is available at http://www.isba.org/cle/coordinators.

Live Onsite Programs

Submission Deadline	Presentation Date
July 15th	December or January
September 15th	February or March
November 15th	April or May
January 15th	June
March 15th	September
May 15th	October or November

Webcast or Webinar Presentations

Submission Deadline	Presentation Date
July 15th	October or November
September 15th	December or January
November 15th	February or March
January 15th	April or May
March 15th	June
May 15th	September

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

LIVE ONSITE PROGRAM*

2018-19 Program Proposal
Illinois State Bar Association

Complete proposal forms must accompany all proposals.

**Live onsite at any location. Live onsite in Chicago office has the option of simultaneous live webcast*

Submission Deadlines –- Presentation Periods:

7/15	**Dec./Jan**
9/15	**Feb./March**
11/15	**April/May**
1/15	**June**
3/15	**Sept.**
5/15	**Oct. /Nov.**

Form is also available at:
www.isba.org/cle/coordinators

Please Submit a *Typed* Form

☐ **I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR.**

☐ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO INCLUDE AN ATTORNEY IN THEIR FIRST 10 YEARS OF PRACTICE AS A PRESENTER OR CO-PRESENTER AS A WAY TO TRAIN AND DEVELOP NEW ISBA LAW ED FACULTY MEMBERS.

A. **Presenting Section Council/Standing or Special Committee:** _____

B. **Co-sponsoring ISBA Section Council(s) or Committee(s)** *(Co-sponsors may but are not required to assist in planning or presenting, but co-sponsor section members will be entitled to pricing discounts, when available, and will be included in target marketing, so co-sponsorship offers many benefits)***:** _____

C. **Title of proposed program** *(keep it short, simple, and catchy)***:** _____

D. **Person(s) submitting proposal** *(Name, address, telephone number, e-mail address, and section)***:**

_____
_____
_____

E. **Requested Program:**

☐ **Live onsite program only**

☐ **Live onsite program in ISBA Chicago office with simultaneous live webcast** *(Please Note: It is imperative that speakers follow the material submission deadlines in order to ensure that live webcast attendees have access to the course materials. Handouts brought to the live, onsite program will not benefit attendees attending remotely.)*

F. **Requested Location and Date(s) For Live Onsite Programs *(Please confirm with ISBA staff if your section has a previously scheduled program date)*:**

☐ **Chicago Only; Date(s):**_____

☐ **Chicago & Other Location within State** *(indicate preferred location(s), if any, and date(s))* _____

☐ **Other Location within State** *(indicate preferred location, if any, and date(s))* _____

G. Program Length:
(To have a live onsite audience, the program must be at least a half-day in length. Shorter programs will be live webcasts or live webinars for remote audiences and ISBA archives.)

☐ **All day** *(9:00 a.m. to at least 4:00 p.m.)*
☐ **Half day** *(at least 3.5 hours)*

H. Segment Length: ☐ I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks.

I. Professional Responsibility MCLE credit, if included: PMCLE topics *(professionalism, civility, legal ethics, diversity and inclusion, or mental health and substance abuse)* **must be <u>a minimum of one hour for full day programs and a minimum of one-half hour for half day programs</u>; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours:**

_____ **Diversity and Inclusion** (for the legal profession)
_____ **Mental Health and Substance Abuse** (affecting lawyers)
_____ **Professionalism, Civility, or Legal Ethics**

J. Financial Contributors: ☐ I have secured financial contributors for this program and have reviewed and followed the guidelines of ISBA's Financial Contributor Policy. Financial Contributor's Name(s) for publicity, address, phone, email, and amount pledged: _____

K. Pre-Program Teleconference: ☐ (optional) I intend to lead a pre-program planning telephone conference for all presenters no later than 7 – 8 weeks prior to the program date. I request ISBA assistance with telephone conference capabilities. *(preferred telephone conference date or week:* _____)

L. Publications (optional): Please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process._____

MARKETING THE PROGRAM

For ISBA marketing purposes please indicate which of the following groups might be interested in this program:

ISBA Sections

- ☐ Administrative Law
- ☐ Agricultural Law
- ☐ Alternative Dispute Resolution
- ☐ Animal Law
- ☐ Bench & Bar
- ☐ Business Advice & Financial Planning
- ☐ Child Law
- ☐ Civil Practice
- ☐ Commercial Banking, Collections & Bankruptcy
- ☐ Construction Law
- ☐ Corporation Securities & Business
- ☐ Corporate Law Department
- ☐ Criminal Justice
- ☐ Education Law
- ☐ Elder Law
- ☐ Employee Benefits
- ☐ Energy, Utilities, Transp. & Telecomm.
- ☐ Environmental Law
- ☐ Family Law
- ☐ Federal Civil Practice
- ☐ Federal Tax
- ☐ General Practice/Solo & Small Firm
- ☐ Health Care
- ☐ Human Rights
- ☐ Insurance Law
- ☐ Intellectual Property
- ☐ International & Immigration Law
- ☐ Labor & Employment
- ☐ Local Government
- ☐ Mental Health Law
- ☐ Mineral Law
- ☐ Real Estate
- ☐ Senior Lawyers
- ☐ State & Local Tax
- ☐ Tort Law
- ☐ Traffic Laws & Courts
- ☐ Trusts & Estates
- ☐ Workers' Compensation
- ☐ Young Lawyers

ISBA Committees

- ☐ ARDC
- ☐ Corrections and Sentencing
- ☐ Delivery of Legal Services
- ☐ Disability Law
- ☐ Government Lawyers
- ☐ Law Office Management & Economics
- ☐ Legal Technology
- ☐ Military Affairs
- ☐ Racial and Ethnic Minorities
- ☐ Sexual Orientation and Gender Identity
- ☐ Women and the Law
- ☐ Other _____

☐ **Certified Public Accountants*** ***(*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)***

☐ **Other Organizations/Agencies_____**

ISBA Law Ed LIVE ONSITE* Program Agenda Template

**Live onsite at any location or live onsite in Chicago office with simultaneous live webcast.*

(Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

Program Title: _____

Sponsoring Section: _____

To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)

_____
_____

To what level of practice experience is this program directed?

☐ Basic ☐ Intermediate ☐ Advanced

Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?

_____

_____

Lead Coordinator Name, Address, Telephone Number, E-mail Address: *(Complimentary program registration is provided for one coordinator.)*

_____

On-Site Program Moderator *(Please Note: In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs.* ***Any additional moderators or coordinators can attend the program for $25.*** *Please indicate the moderator receiving travel/hotel reimbursement:_____ and moderator(s) receiving complimentary registration*_____*

Moderator Name, Addresses, Telephone Number, E-mail Address

_____

Speaker Recruitment

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

- **Speaker will agree to submit materials and Power Point *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
- **Speaker will agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Speaker agrees to arrive not less than 30 minutes prior to presenting**
- **Speaker is an ISBA Member or I will invite the presenter to join ISBA** (http://www.isba.org/membership/join)
- **Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement**
- **Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf**
- **Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty**
- **If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters**

Directions for Preparing the Program Agenda and Submitting Program Proposal

When drafting the Program Agenda,
include the following information for each segment topic:
Please attach additional pages for each segment as needed.

- ✓ **Topic Title _____**
- ✓ **Topic Length** *(in 15-minute increments only)*_____
- ✓ **Topic Description** *(2-3 sentences)* _____
- ✓ **Presenter Name, Address, Telephone Number (cell and office), & E-mail Address _____**
- ✓ ***(optional)* One web address to link from the ISBA program webpage to the speaker's biographical information or firm website _____**
- ✓ **If using out-of-state presenters, please include justification: _____**

Please attach your Program Agenda to this completed Form.
Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:

CLE Department, Attn: Janean Goby
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 e-mail: jgoby@isba.org

Thank you for your proposal!

COORDINATORS:
Please distribute the following page to each of your speakers so they will know what to expect from ISBA and what ISBA needs from them. This form can also be found online at:
www.isba.org/cle/coordinators

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

What you can expect:

- **Contact from the ISBA CLE Coordinator to confirm the dates and times for your presentation**
- **Contact from the ISBA CLE Department regarding deadlines and program information**
- **Publicity for you and your firm in ISBA brochures, marketing emails, and/or color flyers, as well as on our website and in the course materials**
- **A speaker invitation letter that you can use to invite all your peers to the program**
- **Complimentary preparation time MCLE credit at 6 times your actual presentation time**
- **Complimentary registration to the program at which you are speaking**

What ISBA Expects:

- **Your agreement to submit written materials, legal forms, and/or PowerPoint presentation at least *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
- **Your agreement to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Your agreement to arrive not less than 30 minutes prior to presenting**
- **Your membership in ISBA – or consideration to join ISBA (http://www.isba.org/membership/join)**
- **Your agreement to be videotaped by submitting a signed ISBA presentation agreement**
- **Your agreement to review the Checklist for Professional Responsibility topic presentations if you are presenting a segment that qualifies for PMCLE credit (www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf)**
- **Your review and completion of all or part of ISBA's Faculty Development Series (www.isba.org/cle/faculty)**
- **Your agreement to comply with the ISBA travel reimbursement guidelines and limitations**

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

*WEBCAST or WEBINAR PRESENTATIONS**

2017-18 Program Proposal
Illinois State Bar Association

Complete forms must accompany all proposals.

**NO ONSITE AUDIENCE.*

- *Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois.*
- *Webinars are slides and audio presented live from any location that has Internet and phone.*

Submission Deadlines* — Recording Periods:

7/15	**Oct./Nov.**
9/15	**Dec./Jan.**
11/15	**Feb./March**
1/15	**April/May**
3/15	**June**
5/15	**Sept.**

*For "hot topics" you may request an expedited schedule for your recording date.

Form is also available at:
www.isba.org/cle/coordinators

Please Submit a *Typed* Form

☐ **I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR.**

☐ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO INCLUDE AN ATTORNEY IN THEIR FIRST 10 YEARS OF PRACTICE AS A PRESENTER OR CO-PRESENTER AS A WAY TO TRAIN AND DEVELOP NEW ISBA LAW ED FACULTY MEMBERS.

A. **Presenting Section Council/Standing or Special Committee:** _____

B. **Co-sponsoring ISBA Section Council(s) or Committee(s)** *(Co-sponsors may but are not required to assist in planning or presenting, but co-sponsor section members will be entitled to pricing discounts, when available, and will be included in target marketing, so co-sponsorship offers many benefits)***:** _____

C. **Title of proposed program** *(keep it short, simple, and catchy!)***:** _____

D. **Person(s) submitting proposal** *(Include name, address, telephone number, e-mail address, and section committee on which you serve)***:**

_____
_____
_____

E. **Requested Program Date(s)*:** _____
Please Note: Webcasts and Webinars are presented on Wednesday and Thursdays.
If Hot Topic Expedited Date is Requested, Provide Justification _____

F. **Short Program Length, indicate time:** *(1-2 hours recommended)* _____

G. ☐ **I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30 ,45, 60), except introductory and closing remarks.**

H. **Professional Responsibility MCLE credit, if included: PMCLE topics***(professionalism, civility, legal ethics, diversity and inclusion, or mental health and substance abuse)* **must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours:**

_____ **Diversity and Inclusion** *(for the legal profession)*
_____ **Mental Health and Substance Abuse** *(affecting lawyers)*
_____ **Professionalism, Civility, or Legal Ethics**

I. ☐ **Pre-Program Teleconference (optional): I intend to lead a pre-program planning telephone conference for all presenters no later than 7 – 8 weeks prior to the program date. I request ISBA assistance with telephone conference capabilities.** *(preferred telephone conference date or week:*_____)

J. ☐ **Publications (optional):** Please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process. _____

MARKETING THE PROGRAM

For ISBA marketing purposes please indicate which of the following groups might be interested in this program:

ISBA Sections

☐ Administrative Law
☐ Agricultural Law
☐ Alternative Dispute Resolution
☐ Animal Law
☐ Bench & Bar
☐ Business Advice & Financial Planning
☐ Child Law
☐ Civil Practice
☐ Commercial Banking, Collections & Bankruptcy
☐ Construction Law
☐ Corporation Securities & Business
☐ Corporate Law Department
☐ Criminal Justice
☐ Education Law
☐ Elder Law
☐ Employee Benefits
☐ Energy, Utilities, Transp. & Telecomm.
☐ Environmental Law
☐ Family Law
☐ Federal Civil Practice
☐ Federal Tax
☐ General Practice/Solo & Small Firm
☐ Health Care
☐ Human Rights
☐ Insurance Law
☐ Intellectual Property
☐ International & Immigration Law
☐ Labor & Employment
☐ Local Government
☐ Mental Health Law
☐ Mineral Law
☐ Real Estate
☐ Senior Lawyers
☐ State & Local Tax
☐ Tort Law
☐ Traffic Laws & Courts
☐ Trusts & Estates
☐ Workers' Compensation
☐ Young Lawyers

ISBA Committees

☐ ARDC
☐ Corrections and Sentencing
☐ Delivery of Legal Services
☐ Disability Law
☐ Government Lawyers
☐ Law Office Management & Economics
☐ Legal Technology
☐ Mental Health Law
☐ Military Affairs
☐ Racial and Ethnic Minorities
☐ Sexual Orientation and Gender Identity
☐ Women and the Law
☐ Other _____

☐ **Certified Public Accountants*** ***(*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)***
☐ **Other Organizations/Agencies**_____

ISBA Law Ed WEBCAST or WEBINAR PRESENTATION Program Agenda Template

**No onsite audience. Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois. Webinars are slides and audio presented live from any location that has Internet and phone capabilities.*

(Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

Program Title:_____

Sponsoring Section:_____

To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)

_____
_____

To what level of practice experience is this program directed?

☐ Basic ☐ Intermediate ☐ Advanced

Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?

_____
_____

Lead Coordinator Name, Address, Telephone Number, E-mail Address: *(complimentary program registration is provided for one coordinator.)*

_____

Program Moderator *(Please Note: In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs.* ***Any additional moderators or coordinators can attend the program for $25.*** *Please indicate the moderator receiving travel/hotel reimbursement:*_____ *and moderator(s) receiving complimentary registration**_____

Interviewer/Moderator Name, Addresses, Telephone Number, E-mail Address

_____

Speaker Recruitment

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

- **Speaker will agree to submit materials and Power Point *4 weeks prior* to program date for MCLE topics and *6 weeks prior* to program date for PMCLE topics**
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- **Speaker agrees to arrive not less than 30 minutes prior to presenting**
- **Speaker is an ISBA Member or I will invite the presenter to join ISBA** (http://www.isba.org/membership/join)
- **Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement**
- **Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf**
- **Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty**
- **If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters**

Directions for Preparing the Program Agenda and Submitting Program Proposal

When drafting the Program Agenda,
include the following information for each segment topic:
Please attach additional pages for each segment as needed.

- ✓ **Topic Title** _____
- ✓ **Topic Length** *(in 15-minute increments only)* _____
- ✓ **Topic Description** *(2-3 sentences)* _____
- ✓ **Presenter/Panelist Name, Address, Telephone Number, & E-mail Address** _____
- ✓ ***(optional)*** **One web address to link from the ISBA program webpage to the speaker's biographical information or firm website** _____
- ✓ **If out-of-state presenter, please include justification:** _____

Please attach your Program Agenda to this completed Form.
Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:
CLE Department, Attn: Janean Goby
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 e-mail: jgoby@isba.org

Thank you for your proposal!

COORDINATORS:
Please distribute the following page to each of your speakers so they will know what to expect from ISBA and what ISBA needs from them. This form can also be found online at:
www.isba.org/cle/coordinators

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

What you can expect:

- **Contact from the ISBA CLE Coordinator to confirm the dates and times for your presentation**
- **Contact from the ISBA CLE Department regarding deadlines and program information**
- **Publicity for you and your firm in ISBA brochures, marketing emails, and/or color flyers, as well as on our website and in the course materials**
- **A speaker invitation letter that you can use to invite all your peers to the program**
- **Complimentary preparation time MCLE credit at 6 times your actual presentation time**
- **Complimentary registration to the program at which you are speaking**

What ISBA Expects:

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- **Your agreement to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products**
- **Your agreement to arrive not less than 30 minutes prior to presenting**
- **Your membership in ISBA – or consideration to join ISBA (http://www.isba.org/membership/join)**
- **Your agreement to be videotaped by submitting a signed ISBA presentation agreement**
- **Your agreement to review the Checklist for Professional Responsibility topic presentations if you are presenting a segment that qualifies for PMCLE credit (www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf)**
- **Your review and completion of all or part of ISBA's Faculty Development Series (www.isba.org/cle/faculty)**
- **Your agreement to comply with the ISBA travel reimbursement guidelines and limitations**

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Speaker Packet

a. Sample Email to Speakers
b. General Information
c. Sample Speaker Invitation
d. Presentation Agreement

From:	Janean Goby
To:	
Cc:	Staci Howard-Curtis
Subject:	ISBA Trusts and Estates Law Ed Program June 9, 2017 Speaker Info and May 23, 2017 Materials Deadline
Date:	Tuesday, May 02, 2017 11:09:52 AM
Attachments:	CLE Presentation agreement 2019.pdf Speaker Invitation.doc T&E 6-9-17 brochure.docx General Information Document.pdf PMCLE Audit Form.pdf

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Hello ISBA Faculty,

Thank you for agreeing to present or moderate at the ISBA Law Ed Program entitled **Are You Prepared to Handle Some of the Difficult Issues Facing Your Client?** scheduled to be held on **Friday, June 9, 2019** from **9:00 a.m. - 4:45 p.m.** at the **ISBA Chicago Regional Office and as a LIVE webcast.**

We ask that you complete and return the items identified below via email to Janean Goby at speakerinfo@isba.org by **Tuesday, May 23, 2019:**

- **Course Materials –** Materials are required by Supreme Court Rule 795(a)(5) for MCLE courses. **Please submit materials electronically by e-mail and do not exceed 10,000 words (40 pages).**

  If your material is copyrighted, please submit original summaries with references to the copyrighted material rather than the copyrighted material itself. If copyrighted material is submitted, secure written permission for the ISBA to reprint and include a copy of the permission with your materials. This permission must be for live and future electronic presentations. Copyrighted materials include Westlaw and Lexus documents. If using power point, please send us a copy to include in the course book, as well.

  If the requested materials are not received by the above deadline, you will be responsible for providing the appropriate number of copies, three-hole punched, for all attendees and for the printing costs associated thereto. Further, your materials will not be part of the ISBA course book.

- **Presentation Agreement** – Please complete and sign the attached presentation agreement. **Note: this is a new presentation agreement for 2019 and must be signed and submitted, even if you previously spoke with the ISBA in 2018.** Your presentation may be videotaped and made available after the program through the ISBA website in electronic delivery formats that will include your contact information for follow-up questions. Please contact me as soon as possible if have any questions or concerns with this agreement.

- **Biography** – Please include at a minimum your: firm name, educational degrees with dates, brief work history, and bar association memberships/activities.

Audio Visual Needs – If the program is being held outside of the ISBA Chicago Regional Office you are responsible for bringing your own computer. Notify Janean Goby at jgoby@isba.org of any A/V needs beyond those provided by ISBA as described in the attached general information.

If you are not able to meet the deadline, please contact me immediately.

Attached here is a **DRAFT program agenda**. Please review this document closely; if we have incorrectly identified your name, firm, or presentation description, please notify us at speakerinfo@isba.org. If you wish to communicate with the other speakers, you may call or email us for their contact information.

We are also enclosing a **General Information** document with additional information about your engagement with ISBA including:

- Reimbursable expenses;
- Audio visual equipment;
- Registration,
- Faculty resources; and
- PMCLE Audit Form in preparation of a random audit by the Commission on Professionalism of your Professional Responsibility MCLE topic

We encourage you to review ISBA's faculty training videos and resources online at www.isba.org/cle/faculty (especially helpful is the short video on "Using Power Point Effectively.")

Lastly we are attaching a **Speaker Invitation** for you to share with friends and colleagues who you believe would be interested in or benefit from attending the program.

We appreciate your participation in **Are You Prepared to Handle Some of the Difficult Issues Facing Your Client?** and thank you in advance for your timely efforts in preparing and submitting written materials in compliance with MCLE rule requirements.

On behalf of the ISBA and the Committee on Continuing Legal Education, I thank you and look forward to a successful educational program. If you have any questions, please feel free to call or contact me at any time.

Sincerely,

Janean Goby | CLE Program Coordinator
Illinois State Bar Association
424 S. Second St., Springfield, IL 62701
800-252-8908 or 217-525-1760
Email: jgoby@isba.org **Website**: www.isba.org

GENERAL INFORMATION FOR LAW ED SPEAKERS AND MODERATORS

Registration: Complimentary registration is automatically provided to all speakers, one moderator for half-day programs, and two moderators for full-day programs. Additional moderators or coordinators can attend the program at a reduced rate.

Arrival: Please arrive approximately thirty minutes prior to your presentation to ensure that the program proceeds smoothly. Please check in with ISBA staff upon arrival. A speaker's badge and reimbursement form will be provided to you at the ISBA registration desk.

A/V Equipment: The presentation space will be equipped with: podium, microphone(s), LCD projector and screen. Please provide your own computer, unless you are presenting at the ISBA Chicago Regional Office. All speakers should bring a flash drive with their presentation loaded. If you have any additional equipment requests please contact Janean Goby at jgoby@isba.org.

Expenses: You will be reimbursed for reasonable travel expenses at 40 cents per mile plus parking and tolls, or round trip coach airfare not to exceed $350. Lodging costs, if reasonable and necessary, are reimbursed customarily at actual expenses, not to exceed $250, for a single night lodging. Morning speakers are reimbursed for the night prior to the program, while afternoon speakers are reimbursed for the night of the program. Reimbursement requests must be submitted within 60 days after the expense is incurred. You will receive a "Request for Reimbursement of Expenses" form at check-in on the day of the program.

Faculty Resources: As part of ISBA's commitment to the professional development of our presenters, we have created multiple resources which are intended to further your personal and professional growth by expanding your proficiency in communicating. All of these resources can be accessed on our website at: http://www.isba.org/cle/faculty or by clicking the links in the table below:

Short Videos	PDF Documents
Engaging Your Audience	Material Guidelines
Using PowerPoint Effectively	Using PowerPoint to Present your Lecture
Making Your Voice Come Alive	Interactive Teaching Methods
Using Webinar Engagement Tools Effectively	On-Camera Presenter Tips
	PMCLE Presenter Tips
	IL Commission on Professionalism Checklist

We *highly recommend* that you view and/or read through these resources prior to creating your materials and giving your presentation.

Lodging: For assistance in making reservations, it is suggested that you contact Meeting Solutions, an organization that will assist you in finding accommodations at economical rates. To make a hotel reservation, contact Brandon Koenig at 847.808.1818 or by e-mail at Brandon@meetingsolutions.us.

Product Promotion: Display, demonstration, and sale of non-ISBA products or services is generally not permitted in or immediately outside of ISBA continuing legal education programs (for example, during breaks and before and after programs). If a presenter wishes to be provided space for display of brochures or products for sale, he or she must obtain the advance written approval of the Director of Continuing Legal Education.

The Illinois Supreme Court Commission on Professionalism may audit this program to ensure compliance with Professional Responsibility course credit. The audit form used by the Commission is also attached to this email.

Display, demonstration, or promotion of products in the course of a presentation is generally disfavored. In some instances, a program or exhibits associated with a program will focus on how to better use a specific product. In those cases, references to that product will be expected. Otherwise, presenters are asked to strictly limit any reference to the relative merits of any product or service (other than ISBA products or services). If a presenter has a financial or business relationship that allows the presenter to benefit from the promotion of a product, the presenter is required to disclose the existence of that relationship to the ISBA prior to the presentation and to those in attendance during the presentation.

Questions: If you have any questions please contact the ISBA CLE Department toll-free at (800) 252-8908 or at (217) 525-1760.

Business Divorce: Marital and Non-Marital Business Owner Separations

Presented by the ISBA Business & Securities Law Section

Dear Fellow Practitioner,

I would like to personally invite you to attend ISBA's upcoming Law Ed seminar titled, "Business Divorce: Marital and Non-Marital Business Owner Separations," which I will be co-presenting in **Chicago** on **Thursday, January 18, 2018**. For those unable to attend in Chicago, the program will also broadcast as a **live webcast**.

Any lawyer or company advisor (with intermediate practice experience) who is involved in organizing entities, managing marital disputes where business interests are at issue, or negotiating/litigating non-marital separations and planned or unplanned changes of entity control won't want to miss this half-day seminar that gives you the tools you need to handle business owner separation cases. Topics include: the standard clauses of mutual protection and planned or compelled owner exit; alternative dispute resolution options; recapitalization or internal case availability and valuation issues associated with same; the fragility of business enterprises; the difference between going concern valuation and distress sale asset disposition; asset concealment, cash demands, interpersonal disputes, and other issues likely to occur in marital and non-marital arguments among business owners; and the Illinois Rules of Professional Responsibility regarding client identification issues. The seminar is presented by the **ISBA Business & Securities Law Section**. It qualifies for **3.25 hours MCLE credit, including 0.50* hour Professional Responsibility MCLE credit** *(subject to approval).*

I hope you can join us for this program. To register, simply click on the title above or the link below. *[Feel free to pass this along to any of your colleagues who you feel might also be interested in attending this program!]*

Thursday, January 18, 2018
9:00 a.m. – 12:30 p.m.
ISBA Regional Office, 20 S. Clark Street, Suite 900, Chicago
To register – www.isba.org/cle/2018/01/18/businessdivorce
$100/Members; $230/Non-Members

Thursday, January 18, 2018
9:00 a.m. – 12:30 p.m.
Live Webcast
To register - http://onlinecle.isba.org/store/seminar/seminar.php?seminar=105781
$100/Members; $230/Non-Members

Sincerely,
(Speaker name here)

PRESENTATION AGREEMENT
Illinois State Bar Association
424 S. Second St., Springfield, IL 62701
Fax: (217) 525-0712
E-mail: speakerinfo@isba.org

Applicability Dates: This Presentation Agreement applies to all written and spoken presentations ("Presentation(s)") I present for ISBA between the dates of **January 1 – December 31, 2019.**

License Terms: As a condition of the opportunity to present and for no monetary compensation or expectation thereof, I hereby grant to the Illinois State Bar Association (ISBA) the following rights: (1) the right to audio and/or video-record my Presentation; (2) the nonexclusive worldwide right to reproduce, distribute, broadcast, perform, and display the Presentation and to license or syndicate use of the Presentation, or any part thereof, in any medium or form of communication, now existing or hereafter developed, to others; (3) the nonexclusive worldwide right to use the Presentation, or any part thereof, in any other publication produced by the ISBA; (4) the right to include my contact information in all Presentation advertising, promotion, and materials; and (5) the right to contact me regarding questions or discussions arising from future audio and/or video Presentations. In addition, I assign the nonexclusive worldwide right to use the Presentation to promote and publicize the ISBA or its publications, including the right to use my name and likeness and biographical data in such promotions. If so used, I will be identified as the author of the Presentation, or co-author if applicable and waive any right to financial remuneration should any financial benefit accrue to ISBA as a result of publication.

Warranty: I warrant that the Presentation is original to me and that it is not subject to any existing copyright other than that of the undersigned. I further warrant that: (1) I have the full authority to grant the rights in this Agreement; (2) the publication and/or broadcast of the Presentation will not libel anyone or infringe on or invade the rights of others; (3) the publication and/or broadcast of the Presentation will not cause harm to anyone; and (4) the Presentation has not been published elsewhere in whole or in part (except as may be set out in a rider attached herewith). Should the Presentation contain any material which requires written permission for inclusion in the Presentation, I agree to obtain such permission from the owner prior to use and to provide a copy of the permission to ISBA.

Execution of this Agreement does not obligate the ISBA to publish my Presentation or permit me to present.

Presenter's Signature: _____ **Date:** _____

Please complete the following contact information. I understand that this contact information will be included in course materials and may be used by the ISBA or others to communicate with me about the Presentation:

*Name (print): _____

Firm Name/Employer: _____

* Mailing Address: _____

* City _____ State _____ Zip _____

* Phone: _____ ***(and/or)*** * E-mail: _____

Fax: _____ (***indicates required information – must provide phone or e-mail)**

U.S. GOVERNMENT EMPLOYEES, PLEASE CHECK [a] OR [b]: _____ [a] This Work was written on my own time and was not required by my assigned job or official duties as a US. Government employee. _____ [b] This Work was written as part of my assigned job or official duties as a U.S. Government employee.

Law Ed Presenter Information

(Optional) The ISBA strives to have diversity among presenters. If you self-identify as a member of a diverse group, please state which group(s):_____. Diversity group identification is used solely for aggregate statistical purposes. ISBA will destroy and will not disclose individual presenter's responses to this optional inquiry.

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Resources and ISBA Committee and Staff Support

a. List of Coordinators and Liaisons
b. Role of CLE Liaison
c. Annual CLE Report Contents
d. Law Ed Promotions
e. Sample Evaluation Forms

FY 19-20
CLE Coordinators and Liaisons

Section/Committee	Section/Committee CLE Coordinator	Coordinator Email	CLE Committee Member Liasion	CLE Committee Member Liasion Email
Administrative Law	**Yolaine Dauphin**	yd9098@aol.com	Eric Hanson	ehanson@msclawfirm.com
	Hon. Patricia Jackowiak	patricia.jackowiak@cityofchicago.org		
Agricultural Law	Barry Hines	barry@hineslaw.net	Heather McPherson	hm@mcphersonlaw.com
Alternative Dispute Resolution	**Kaitlin Wolff**	kwolff@uniformlaws.org	Kelly Garret Hicks	kelly@lawyerforfamilies.com
	Jennifer Thompson	jennifer@mschaferlaw.com		
Animal Law	Jane McBride	jmcbride@atg.state.il.us	Lisa Nyuli	lmn@attorneys-illinois.com
Bench & Bar	Hon. Michael Chmiel	mjchmiel@22ndcircuit.illinoiscourts.gov	Eric Hanson	ehanson@msclawfirm.com
Bus. Adv. & Fin. Planning	Mary Stark Hood	maryshood@comcast.net	John Johnston	johnjohnston@dixonjohnston.com
Business & Securites Law	Cory White	cwhite@intblg.com	Mary Petruchius	mfp2952@gmail.com
Child Law	Robert (Bob) Ackley	ackley.robert@gmail.com	Pam Kuzniar	kuzniar@kuzniarsimons.com
	Melissa (Missy) Greathouse	mgreathouse@dri-inc.org		
Civil Practice & Procedure	Candace Hansford	chansford@law-hd.com	Tim Storm	tjs@law-storm.com
Commercial Banking, Collections & Bankruptcy	Samuel Levine	slevine@bdlfirm.com	Paul Osborn	osborn@wmpj.com
Construction Law	David Arena	darena@dimontelaw.com	Kelly Garret Hicks	kelly@lawyerforfamilies.com
Criminal Justice	Patricia Pantoja	pantoja.patty@gmail.com	Brittany Kimble	info@brittanykimbleesq.com
Education Law	Robert Lyons	rob.lyons@ieanea.org	Carol Casey	carol.casey@cookcountyil.gov
Elder Law	Dolores Wigman	dwigman@pslegal.org	Heather McPherson	hm@mcphersonlaw.com
Employee Benefits			Martin Siemer	martin.siemer@ymail.com
Energy, Utilities, Transportation & Telecommunications	Gerardo Delgado	gjdelgado@gmail.com	Chantelle Porter	cporter@atclaw.com
Environmental Law			Randy Cox	rcox@feldman-wasser.com
Family Law	Pamela Kuzniar	kuzniar@kuzniarsimons.com	Pam Kuzniar	kuzniar@kuzniarsimons.com
Federal Civil Practice	Jo Anna Pollock	jpollock@simmonsfirm.com	Kenneth Matuszewski	kmatusze13@gmail.com
Federal Tax	Colin Walsh	colinjwalsh1@gmail.com	Hon. Carey Gill	careycarriergill@gmail.com
General Practice	Van-Lear Eckert	vanleare@yahoo.com	Kelli Gordon	kgordon@feldman-wasser.com
Health Care	Meghan Karhliker	karhliker.meghan@mhsil.com	John Johnston	johnjohnston@dixonjohnston.com
Human Rights	Glenn Gaffney	grgaffney@aol.com	Chantelle Porter	cporter@atclaw.com
Insurance Law	George Leynaud	george@leynaudlaw.com	Ryan Gammelgard	ryan.gammelgard.nd9v@statefarm.com
Intellectual Property	Aaron Brooks	awb@hkrockford.com	Kenneth Matuszewski	kmatusze13@gmail.com
International & Immigration Law			Deborah Besserman	dbesserman@bessermanlaw.com
Labor & Employment	Alan Kaplan	akaplan@masudafunai.com	Martin Siemer	martin.siemer@ymail.com
Local Government			Carol Casey	carol.casey@cookcountyil.gov

FY 19-20
CLE Coordinators and Liaisons

Section/Committee	Section/Committee CLE Coordinator	Coordinator Email	CLE Committee Member Liasion	CLE Committee Member Liasion Email
Mental Health Law			Carol Casey	carol.casey@cookcountyil.gov
Mineral Law	Laura Harmon	lharmon@ilfb.org	Kelli Gordon	kgordon@feldman-wasser.com
Privacy & Information Security Law	Fariz Burhanuddin	fburhanuddin@caputolawfirm.com	Tim Storm	tjs@law-storm.com
Real Estate	Emily Vivian	vivian@egbclaw.com	Hon. Carey Gill	careycarriergill@gmail.com
Senior Lawyers	Raquel (Rocky) Martinez	martinez.rocky5@gmail.com	Paul Osborn	osborn@wmpj.com
State & Local Tax	**Gary Smith**	gary@garyhsmith.com	Paul Osborn	osborn@wmpj.com
	David Kupiec	dkupiec@kupiecandmartin.com		
Tort Law	Kathryn L. Conway	kconway@prslaw.com	Anita DeCarlo	adecarlo@ankinlaw.com
Traffic Laws & Courts	Brick Van Der Snick	brick@lawvlf.com	Randy Cox	rcox@feldman-wasser.com
Trusts & Estates	**William Kuehn**	wrk@wmklaw.com	Heather McPherson	hm@mcphersonlaw.com
	Patrick Owens	powens@dimontelaw.com		
Workers' Compensation	John Adams	jbaworkcomp@yahoo.com	Anita DeCarlo	adecarlo@ankinlaw.com
Young Lawyers			Kenneth Matuszewski	kmatusze13@gmail.com
			Tim Storm	tjs@law-storm.com
ARDC	Kristin Olson	kristin@stangelawfirm.com	Deborah Besserman	dbesserman@bessermanlaw.com
Corrections and Sentencing	**Kristine Honiotes**	kristine@honioteslaw.com	Edward Huntley	ewh324@aol.com
	Jessica Koester	jessica@koester-law.com		
Delivery of Legal Services	Terri Ross	tross@illinoislegalaid.org	Mary Petruchius	mfp2952@gmail.com
Disability Law	Barbara Goeben	bgoeben@hotmail.com	Lisa Nyuli	lmn@attorneys-illinois.com
Government Lawyers			Edward Huntley	ewh324@aol.com
Law Office Management & Economics	John Olmstead	jolmstead@olmsteadassoc.com	Nancy Easum	easumlawoffice@gmail.com
Legal Technology	Aaron Brooks	awb@hkrockford.com	Randy Cox	rcox@feldman-wasser.com
Military Affairs	Edward Farmer	ed@farmerlawoffices.com	Nancy Easum	easumlawoffice@gmail.com
Racial & Ethnic Minorities in the Law	Sharon Eiseman	seiseman@atg.state.il.us	Brittany Kimble	info@brittanykimbleesq.com
Sexual Orientation and Gender Identity			Annemarie Kill	akill@averycamerlingokill.com
Women and the Law	Dina M. Ninfo	DMNBoards@gmail.com	Annemarie Kill	akill@averycamerlingokill.com

RESPONSIBILITIES AND ROLE
OF CLE COMMITTEE LIAISON TO ISBA SECTION/COMMITTEE

CLE Committee liaisons to an ISBA section council or committee are listed on the roster of the section/committee and are complimentary members of the section/committee. The intent is two-fold. First, to make the CLE liaison more aware of upcoming CLE programs of the section or committee, in a supportive role. Second, to convey to the CLE Coordinator the larger goals of ISBA CLE, while stressing current CLE priorities such as:

- Developing new faculty members
- Member preference for electronic format of CLE consumption (77% electronic)
- Programming regarding emerging and "hot" topics
- Maintaining a catalog of relevant content for members

The CLE Liaison will support the CLE Coordinator and the section council or committee in the following ways:

- In June of each year, and ideally prior to the Annual Meeting, contact the CLE Coordinator and i) review the Annual CLE Report, including minimum programming expectations, 2) review the process of identifying and programming for missing topics (see attached), 3) let them know the liaison is a resource if they need help planning upcoming programs or understanding the process, and 4) review CLE priorities
- On or before the business meeting following the Annual Meeting (Sept/Oct), if necessary, follow-up with the Coordinator regarding identifying and programming for missing topics
- On or before the Midyear Meeting (December), if needed, follow-up with the Coordinator regarding identifying and programming for missing topics, remind about minimum expectations, and explain any new CLE priorities
- Read the agenda and minutes and communicate with the section/committee CLE Coordinator prior to or after the meeting, when needed.
- When appropriate, attend the section/committee meeting by teleconference (preferred, if attending) or attend the section/committee meeting in person. CLE Committee liaisons will receive meeting notices and agendas, but do not have voting rights, nor does your presence affect any quorum requirements, unless the liaison is otherwise a member. Reimbursement will be paid out of the CLE committee budget.
- Review proposals and offer input as necessary, including suggestions for co-sponsors

Committee on Women & the Law

Memorandum

To: ISBA Section and Committee Chairs and CLE Coordinators

From: ISBA CLE Committee and Staff

Date: June 2019

Re: FY 18-19 CLE REPORT

To assist your section in providing relevant, timely and fully-developed CLE programs, both live onsite and in the ISBA Online CLE catalog, please review the attached documents which provide an overview of your section's CLE programming and some tips and requests for future programming.

1. Your Section's CLE Program History Since 2010[1]
2. Requested Proposal Numbers for FY18-19 and FY19-20
3. Number of Active Dues Paying Section Members
4. Program Evaluation Summary for FY18-19 Programs (if any)
5. Future Programming Guidance
    a. Request to Review Online CLE Catalog Programs with How-To Tips
    b. Online CLE Accreditation Extension Request Form
    c. ISBA's Top 50 Online CLE Topics – May 2018- May 2019
    d. Master Curriculum Calendar for Upcoming 2019-20 Bar Year
    e. Program Proposal Forms Available Online – www.isba.org/cle/coordinators

[1] If a program is marked "not online" in the "Online Orders" column, it means it is not in the Online CLE catalog because it is either still in production, had technical problems in recording, or had low evaluation scores.

ISBA Law Ed Program Promotions

ISBA Website
Upon approval, CLE program titles and dates are added to the ISBA Law Ed calendar on the ISBA website at www.isba.org/cle/upcoming. Additional information is added as the program is finalized and the course is opened for online registration.

Printed Brochure
For live onsite programs, a print brochure is mailed to members of the sponsoring section and to additional members in other sections that may have an interest in the topic and/or who live in the geographic area of the program. Brochures are typically mailed at the bulk postage rate so should be mailed 5-6 weeks prior to the program to reach the target audience in a timely manner. If ISBA does not have complete information from the CLE Coordinator for the brochure by deadline, it may not reach the target audience in time to be effective or may not be mailed at all.

Broadcast Email
ISBA members receive a weekly CLE email newsletter listing upcoming CLE programs. Programs are included in at least two of these emails approximately one month prior to the program date. To avoid email overload for our members, individual program emails are not routinely sent.

Program Flyer
For programs that do not have a live onsite audience, such as short webcasts and webinars, a one-page, color flyer is created and emailed to program coordinators, moderators, and speakers with the request that they distribute. Copies of the flyers are also printed and distributed in registration confirmation letters, at Law Ed programs and at the ISBA Chicago Regional Office. These flyers are occasionally mailed to ISBA members.

Illinois Bar Journal
Every month the Illinois Bar Journal includes a one-page ISBA Law Ed Program list featuring upcoming CLE programs for the next month along with registration instructions.

ISBA Blog
ISBA writes a blog post for most Law Ed programs, based on the agenda and promotional information and the posts are included in the Bar News online archives at http://iln.isba.org/blog/cle The Illinois Lawyer Now and the Bar News email also features one CLE blog post per week.

Section and Committee Newsletters
ISBA newsletters include a listing of CLE programs sponsored by that specific section or committee and, if space if available, the list includes additional ISBA Law Ed programs with registration instructions.

E-Clips
The widely read and popular ISBA daily E-Clips email features an upcoming Law Ed program and lists the next 3 – 4 programs on the Law Ed calendar in a prominent location in the email. It also contains a link to the full online CLE Calendar.

Speaker Invitation
All Law Ed speakers receive a customized "speaker invitation" template which they are asked to sign and distribute to their colleagues. It is sent as an electronic attachment to the speaker packet, formatted as a letter and includes all of the program information. This adds a personal touch to the promotion and is a great way for speakers to actively help increase program attendance!

A sample speaker invitation can be found in the coordinator play book.

EVALUATION

Title
Presented by the ISBA…
Date, location

Your evaluation of the program and speakers is very important. We review each evaluation so please consider each question carefully. Thank you.

Please circle your responses below: 1=poor, 3=okay, 5=excellent

What is your assessment of the program? **1 2 3 4 5**

What is your assessment of the quality of the program materials? **1 2 3 4 5**

What did you think of the program venue? **1 2 3 4 5**

Moderator
Name **1 2 3 4 5**

	Substance	Materials	Presenter
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**

What did you like best about this course?

What changes or additions to this program would you recommend?

What suggestions do you have for future topics?

Additional comments or testimonial:

If testimonial, may we use your name in our publicity? __Yes ___No

If yes, please provide your name_____

Would you like to volunteer to speak at an ISBA Law Ed program or recommend a speaker?

If so, please submit the speaker bio and topic via email to speakerinfo@isba.org or complete the following:

Recommended speaker_____ **Topic**_____

Contact Information_____

What topic(s) would you suggest for ISBA's "Quick Takes For Your Practice" videos (short 5 minute videos with just in time practice tips at www.isba.org/videos)?

_____

_____

Would you like to record the video or suggest a speaker? (if so, provide contact information)

_____

_____

ABOUT YOU

My principal office is located in:

_____Central IL
_____Northern IL
_____Chicago
_____Southern IL
_____Collar Co.
_____Other (please list)

Number of attorneys in firm/office:

_____solo
_____2-5
_____6-10
_____11-20
_____21-40
_____over 40
_____Cook
_____

_____I am an attorney practicing in

other than a law firm ___
(specify)

I have practiced law:

_____Under 3 years _____3-5 years _____I am not an attorney
_____6-15 years _____over 15 years _____Judge _____ Other _____

Are you an ISBA member? Yes ___ No ___ If not, would you be interested in membership info? Yes ___ No ___

Do you receive the newsletter prepared by the Section sponsoring this program? Yes ___ No ___

If not, would you like to join the section and receive the newsletter? Yes ___ No ___

If you would like ISBA membership or section membership information please provide your name, address, phone number, and email:

_____

_____

How did you hear about this program? ___Illinois Lawyer Now ___Brochure/Direct Mail ___E-Clips ___E-Mail Notification ___ISBA Website ___Section Newsletter ___Speaker Invitation ___Illinois Bar Journal ___E-mail Discussion Group/ISBA Central ___Social Media (please specify)_____
___Other _____

Within the last three years I have attended ISBA CLE Programs: __1 Time __ 2 - 5 Times __6 - 10 Times ___More than 10 Times

Please complete and return to the Registration Desk.
Thank you.

EVALUATION

PMCLE Course Title

Presented by the ISBA …
Date, Location

Your evaluation of the program and speakers is very important. We review each evaluation so please consider each question carefully. Thank you.

Please circle your responses below: 1=poor, 3=okay, 5=excellent

What is your assessment of the program? **1 2 3 4 5**

What is your assessment of the quality of the program materials? **1 2 3 4 5**

What did you think of the program venue? **1 2 3 4 5**

Moderator
Speaker **1 2 3 4 5**

	Substance	Materials	Presenter
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**
Title Speaker	**1 2 3 4 5**	**1 2 3 4 5**	**1 2 3 4 5**

Learning objectives for professional responsibility were clearly defined by course faculty **1 2 3 4 5**

Course methods (hypotheticals, simulations, media, lecture, exercises, or discussion) involved in the learning process **1 2 3 4 5**

During this course I was actively thinking about difficult dilemmas and exploring highly professional/ethical options to address these dilemmas. **1 2 3 4 5**

My knowledge in one or more areas of professional responsibility (professionalism, ethics, civility, diversity or mental health) has **1 2 3 4 5**

expanded as a result of this course.

This course contributed valuable strategies that I will use to address professional and/or ethical challenges **1 2 3 4 5**

Ways in which I approach and/or conduct my practice of law will likely change as a result of participating in this course **1 2 3 4 5**

This course will likely strengthen my job performance. **1 2 3 4 5**

What did you like best about this course?

What changes or additions to this program would you recommend?

What suggestions do you have for future topics?

Additional comments or testimonial:

If testimonial, may we use your name in our publicity? __Yes ___No

If yes, please provide your name_____

What topic(s) would you suggest for ISBA's "Quick Takes For Your Practice" videos (short videos with just in time practice tips at www.isba.org/videos)?

_____

_____

Would you like to record the video or suggest a speaker? (if so, provide contact information)

ABOUT YOU

My principal office is located in:

_____Central IL _____Southern IL
_____Northern IL _____Collar Co.
_____Chicago _____Other

Number of attorneys in firm/office:

_____solo _____11-20
_____2-5 _____21-40
_____6-10 _____over 40
_____Cook
_____I am an attorney practicing in other than a law firm _____ (specify)

I have practiced law:

_____Under 3 years _____3-5 years _____I am not an attorney
_____6-15 years _____over 15 years _____Judge _____ Other _____

Are you an ISBA member? Yes ___ No ___ If not, would you be interested in membership info? Yes ___ No ___

Do you receive the newsletter prepared by the Section sponsoring this program? Yes ___ No ___

If not, would you like to join the section and receive the newsletter? Yes ___ No ___

If you would like ISBA membership or section membership information please provide your name, address, phone number, and email:

_____

_____

How did you hear about this program? ___Illinois Lawyer Now ___Brochure/Direct Mail ___E-Clips ___E-Mail Notification ___ISBA Website ___Section Newsletter ___Speaker Invitation ___Illinois Bar Journal ___E-mail Discussion Group/ISBA Central ___Social Media (please specify)_____
___Other _____

Within the last three years I have attended ISBA CLE Programs: ___1 Time ___ 2 - 5 Times ___6 - 10 Times ___More than 10 Times

Please complete and return to the Registration Desk.
Thank you.

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

ISBA's Law Ed Faculty Resources

a. Video Resources
b. Materials Guidelines
c. Using PowerPoint to Present Your Lecture
d. On-Camera Presentation Tips
e. PMCLE Presenter Tips
f. Options for Interactivity

Short Faculty Development Video Resources

Engaging Your Audience

Using Power Point Effectively

Making Your Voice Come Alive

Using Webinar Engagement Tools Effectively

Bill Moller's Top Tips for a Killer On-Camera Presentation

Prepare for your next on-camera presentation with tips and advice from broadcast journalist pro, Bill Moller, in this short video: ***Bill Moller's Tips on How to Present a Killer CLE Presentation***. Bill helps you prepare for your next CLE studio presentation and on-camera courtroom appearance with his prize-worthy presentation tips – from preparing your notes and organizing your presentation, to presenting your information on-camera with energy, comfort and ease!

For more Faculty Resources, please visit:
www.isba.org/cle/faculty

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

I. Why Prepare Great Course Materials and Submit them On Time?

1. Materials reinforce the learning objectives conveyed to the audience in your presentation.

2. You will learn more about the subject through the preparation of materials.

3. You will earn MCLE credit for prep time for up to 6 times your presentation time.

4. You will increase your credibility, enhance your reputation, and improve potential business opportunities.

5. You will better serve your legal audience and your evaluation scores will improve.

6. Attendees expect your complete set of great materials to be in the course book.

7. Your well-developed materials in the course book, demonstrates you can meet deadlines, which will improve your reputation and enhance opportunities for referrals from audience members.

8. If your materials are not in the course book, it may reflect negatively on your organizational skills and generate negative evaluation comments.

9. Only CLE programs with all speakers' materials submitted by the due date are eligible for the annual "ISBA Law Ed Program of the Year Award."

10. If you don't submit materials by the deadline, it will be your responsibility and expense to copy handouts of your materials for attendees.

II. What Does ISBA Expect?

1. "Thorough, high quality, readable and carefully prepared written materials" (S.Ct. Rule 795(5)).

2. Original materials (preferred).
(If copyrighted materials are submitted, you must provide written permission for ISBA to use or they will not be included in the course book. ISBA cannot use Lexis and Westlaw materials.)

3. Materials sent electronically.
(Word and Power Point only; scanning hard copies produces an inferior print quality.)

4. Materials submitted by the required deadline so they are in the Law Ed course book:
** 4 weeks prior to program for MCLE topics*
** 5-6 weeks prior to program for Professional Responsibility MCLE topics so that ISBA can apply to IL Supreme Ct. Commission on Professionalism for PMCLE credit*

5. Supplemental Power Point slides to highlight important points, submitted in advance for inclusion in the course book.
(Do not include all of your written material in the Power Point format.)

6. Signed presentation agreement giving ISBA non-exclusive rights to reuse the presentation and materials.
(You also retain those rights as the author/presenter.)

III. Top Ten Tips for Terrific Law Ed Materials

1. Establish learning objectives for your presentation and make sure the materials support your objectives.

2. Write materials that will provide a complete, independent legal resource after the program is over.

3. Stay on topic by delivering information about the topic described in the original brochure promoting the program.

4. Provide original language or your own paraphrase whenever possible.

5. Don't attach copies of statutes or cases unless you are presenting from the actual language of the attachment.

6. Provide forms if pertinent; *attendees love them.*

7. Provide full citations of all cases and resources that you reference.

8. Organize with headings, subheadings, etc. for readability.

9. Edit for grammar, punctuation, proper word usage, and spelling. *Your Law Ed materials reflect your work quality.*

10. Remember, your Law Ed materials reflect your work quality, so represent yourself well with great materials.

IV. ISBA Law Ed Formatting and Submission Requirements

1. **The ISBA CLE Editorial Staff accepts original speaker materials in MS Word and Power Point only.** Please do not submit your materials in PDF format! The only exceptions to this are court dockets, materials extracted from FastCase (or similar database research center), articles/information taken from print magazines, copies of a case or statute, etc. (In essence, things that you, the author, did not create yourself, but have secured and provided written permission for ISBA to reprint.)

2. **All original materials should be:**

   a. Typed in Times New Roman
   b. Typed in 12-point font
   c. Double-spaced
   d. Paginated (center bottom)

3. **All materials (including bios) should be submitted to the ISBA CLE Editorial Staff no later than four weeks (for general MCLE) or 5-6 weeks (for PMCLE) prior to the program date!** Every program contains a course book, and every course book must be constructed, printed, and shipped to the program location. This process takes time…which means it is imperative that you submit your materials at least four to six weeks prior to the program. Materials submitted late will not be included in the ISBA course book and will not be available to webcast viewers of live webcast programs. In these situations, it will be your responsibility, as the speaker, to copy, pay for and bring enough copies of the material to hand out to the on-site registrants. Live webcast viewers will just be left out -- to the detriment of the online viewer *and your evaluation rating*. Also, all Professional Responsibility topics must have approval of the IL Supreme Court Commission on Professionalism. This application/approval process takes 2-4 weeks and program attendees expect certainty as to PMCLE credit approval.

4. **Materials should be submitted electronically (do not convert materials to PDF format prior to submitting). If you have no other option than to use snail mail....**

   a. Do not staple materials together. Please use a paper clip. (Should the paper clip come off, this is where the page numbers come in handy for us.)
   b. Submitted copies should be "clean" and "camera ready"…no crooked photocopies, please!

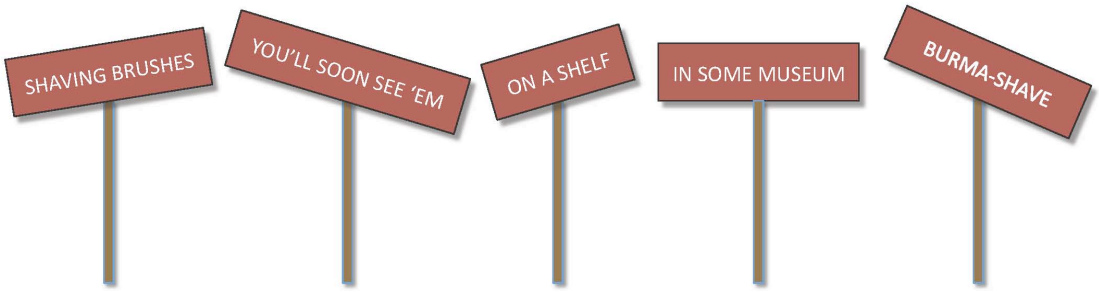
5. **Power Point slides are meant to highlight important points!** While Power Point slide shows are a great way to engage your audience during presentations, they are not the appropriate way to present ***all*** of your information. Please limit the amount of information included on each slide. You should use an additional textual document to present the bulk of your materials and reference information.

6. **Please submit your bio with your materials!** Every ISBA course book contains a "biography" section, which is our way of giving credit where credit is due. Bios are a way for speakers to advertise themselves…to flaunt their accomplishments, so to speak. Bios submitted late will not be included in the ISBA course book. If you do not have a bio, please complete and return the biography form included in your speaker packet and ISBA staff will format the information for inclusion in the book.

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Using Power Point to Present Your Lecture

In 1925, Clinton Odell, owner of Burma-Shave, launched a unique advertising campaign that literally transformed his small Midwestern company into one of the most popular and memorable shaving cream manufacturers in American history. How'd he do it? By creating multi-part messages stretched across multiple billboards along American highways as a way to keep the traveling reader "hooked" by the promise of a punch-line at the end. Why did this work so well? Because the billboard messages were simple and fun!



The expansion of the Interstate system and increased travel speeds eventually made this a difficult advertising avenue and, in 1963, when Phillip Morris acquired the company, the signs were abandoned altogether. Primitive, painted, and simple though they were, much can be learned from Odell's hugely successful 38-year advertising scheme.

Rule #1: *Use Few Words!*

Odell knew that Americans would embrace his product if only they'd give it a try. Instead of creating overwhelming ads highlighting the shaving cream's rich, imported ingredients, Odell chose to lure potential buyers with entertaining bite-sized billboards and let the product speak for itself.

- ✓ POINT: PowerPoint is like your own personal billboard! Only the key words should be on display; your *lecture* should provide the details.

Keep Burma-Shave's simplicity in mind when creating your PowerPoint presentation. Don't clutter your slides with too much information; after all, the audience paid to learn that information from you, the speaker, not read the information from a projection screen. Slides should be used to keep you on topic as you speak, to offer a simple map for attendees so they'll know where they've been and where they're going, and to highlight the key points of your information.

- ✓ RULE OF THUMB:
  - Create a simple header for each slide.
  - Use no more than 4 or 5 bullet points throughout a single slide.
  - Each bulleted point should be short and simple – 4 or 5 words each.
  - Remember: Less is more!

Rule #2: ***Keep It Clear and Uncluttered!***

Odell knew that the billboards would have to be simple if he expected motorists to have time to comprehend what was being presented as they drove along America's highways, which is why he created simple two-color signs without any graphics. (Wood boards painted red with a plain white font were standard.)

- ✓ POINT: PowerPoint presentations do not have to be boring black font on a boring white background, but giving a presentation to an audience is not the time to flaunt your Picasso-like skills, either!

Having too many fancy design elements and using funky fonts makes it hard to concentrate on the information being presented. Choose a background that's easy on the eye and doesn't give your audience a headache. The adage, "a picture is worth a thousand words" is often the perfect mantra when creating a presentation because oftentimes a great picture supports your heading better than any bulleted list could ever do.

- ✓ RULE OF THUMB:
  - Although PowerPoint offers several slide templates, most of these contain unnecessary and oftentimes distracting design elements. Be sure to choose a slide design that doesn't compete with the information being presented.
  - Use a background color that doesn't strain the eyes of your audience.
  - Choose a simple, clean font that's easy to read; black font is best, although a white font works, too, depending on the color of your background. (Be sure the font color and background color doesn't clash.)
  - When applicable, pictures or graphics can be great additions to your presentation, but be sure to include no more than one picture/graphic per slide. (And that it's relevant to your topic!)
  - Forgo using sound effects, annoying slide transition options, and animation schemes. These rarely, if ever, add value to your presentation.

Rule #3: ***Use Large Font!***

Odell knew that painting the letters too small would result in either the signs going unnoticed by motorists or put his readers in danger as they tried to read the signs while driving. With these two issues in mind, the original Burma-Shave signs were 10 inches high and 36 inches long – making each billboard the perfect size for travelers to easily read the messages from the roadway. (It's interesting to note that the signs increased in size over the years – which just goes to show that in some cases, bigger really is better.)

- ✓ POINT: Make your font large enough that everyone in the room can read the information. Don't starve your audience on font size in an effort to stuff them on material!

This is 32-point font.

This is 20-point font.

Both will be enlarged when projected on a screen for presentation, but which would be easier to read if you were nodding off in the back of the classroom?

- ✓ RULE OF THUMB:
  - Presentation headers should be 32-point font or larger.
  - The body of your slide should be no less than 24-point font.
  - If the information you are trying to introduce on your slide doesn't fit unless you shrink the font to something smaller than 24-point, then it's time to create a new slide.

Although the Burma-Shave billboards were designed on a dime, the signs' success has become legendary among the advertising industry – and with good reason. The simplicity and humor of each billboard seeped into the hearts of America and ultimately raised Odell from a struggling Midwestern entrepreneur to one of the largest shaving cream manufacturers in the country. PowerPoint presentations should be created in a similar fashion – simple, uncluttered, and easy to read. Save all the hard stuff for your lecture and course book materials. Your audience will thank you.

Studio Presentations

On-Camera Presentations Tips

1. Preparation, Preparation, Preparation

- The best preparation is to know your materials and be yourself
- Identify Learning Objectives
- Fully Develop Written Materials for Attendees (you may refer to them on-camera as attendees will have an online pdf of your materials)
- Develop Power Point Slides for visual interest during presentation – online viewers will see both you and the Power Point slides on-screen at all times
- Prepare questions for the Moderator to ask you during the interview format and write an outline of your answers
- Rehearse on your own. Practice in front of a mirror or on video with your home video camera. Use enthusiasm in your delivery.
- Conduct pre-interview with moderator, if possible

2. Prepare for your on-camera appearance

- Wear solid color clothing that fits and is comfortable. Dark, solid colors work best. Avoid intricate patterns and shiny fabrics as they can cause problems for the camera and viewer. Also avoid green in case the green screen is used.
- If you wear make-up, wear generous amounts - the camera and lights can make you appear washed out. Consider powder to avoid a shine.
- Arrive early to make sure everything is ready and give yourself time to relax.
- Print your speaker notes on blue, yellow, or other non-reflective colored paper. White paper causes a reflection on your face on-camera.

3. Present with Confidence

- Do not read. It's ok to refer to your notes, but don't read verbatim.
- Announce what you are going to say, and then say it
- Repeat and Summarize
- Use real life or hypothetical examples
- Look at the moderator as you converse in the interview format. You will very rarely look directly at a camera.
- Follow structure of your written materials and pre-planned outline.
- Stay within time limits
- Smile, as much as is naturally possible

ISBA LAW ED
CLE FOR ILLINOIS LAWYERS

Professional Responsibility MCLE Presenter Tips

1. Prepare an identifiable segment of not less than 30 minutes for presentation on professionalism, civility, legal ethics, diversity and inclusion, or mental health and substance abuse.

2. Submit high-quality, fully developed written materials to ISBA **6 weeks** prior to the presentation so ISBA can apply to the Illinois Supreme Court Commission on Professionalism for credit approval and have sufficient time to receive approval and promote the PMCLE credit. Attendees frequently choose programs based on whether the PMCLE credit is pre-approved.

3. Submit original materials. If copyrighted materials are submitted, you must secure and provide written permission for ISBA to reprint and use them in future electronic presentations. ***Westlaw and Lexis materials cannot be accepted due to copyright issues.***

4. Incorporate active learning experiences into the delivery method – such as hypotheticals or case simulations – to encourage audience interactivity.

5. Review the Illinois Supreme Court Commission on Professionalism's Professional Responsibility Course Development Checklist prior to developing your presentation. www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf

Options for Interactivity in ISBA CLE Programs

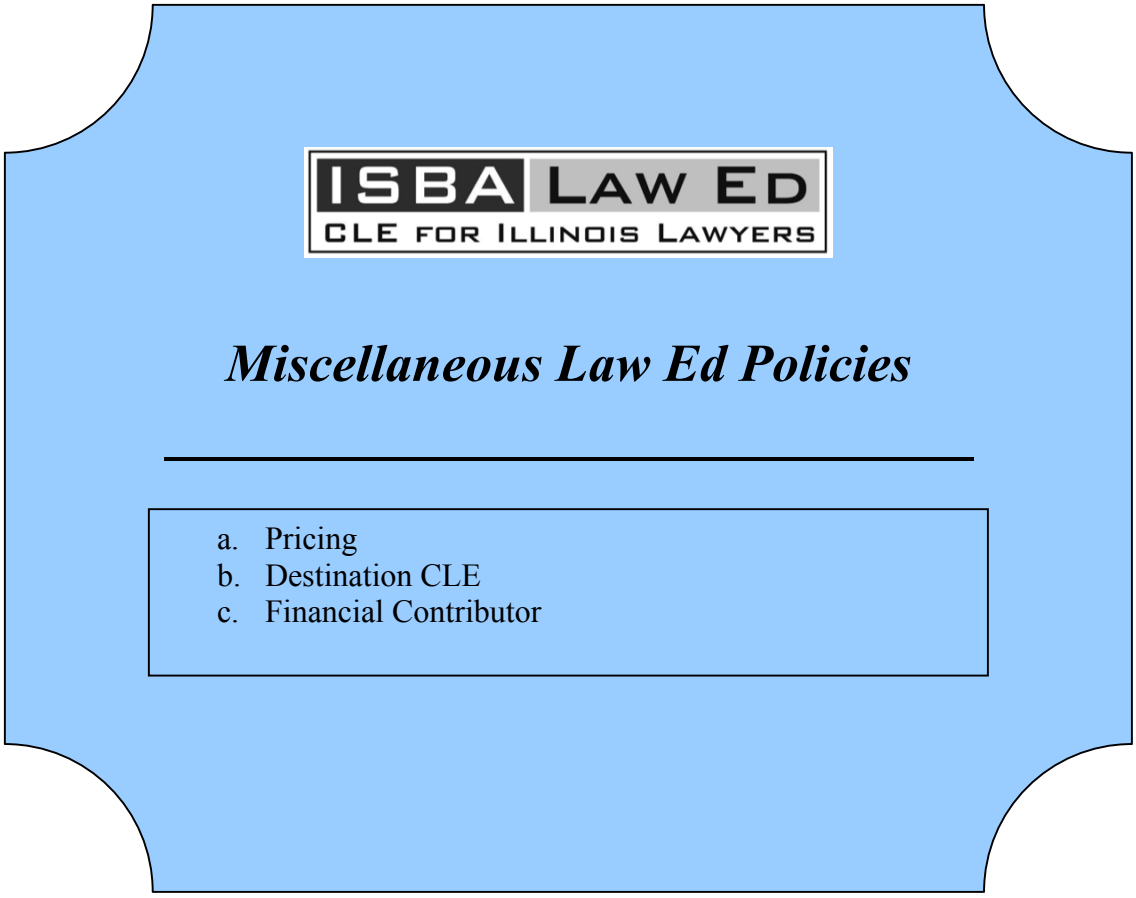
1. Instant polling and results with ISBA's New Audience Response Polling System!
2. Poll Everywhere - Using smart phones for polling
3. Interview/Talk Show format for presenters
4. Skits
5. Hypotheticals
6. Quizzes
7. Offering the audience choices (such as "choose a table" and "choose a topic")
8. Flip Chart to list audience responses during discussion segments
9. Music
10. Questions on Wall Charts – ask audience to get up and write their answers on the charts
11. Post possible answers to your questions on wall charts – ask audience to post sticky dots on the answers they agree with, then discuss
12. Real Time Internet Searches (if wireless is provided)
13. Have Audience Text questions to speaker (provide phone number)
14. Homework – get audience to commit to doing one new thing
15. Casual presentation set ups instead of podiums
16. Exercises/Simulations
17. Hands on Worksheets
18. Question and Answer with Audience Participation
19. Webcast live events
20. Games
21. Video Clips/Video Vignettes
22. Flipped classroom - assign lecture or Ted Talk before program and discuss at program
23. Bookmarking Websites to show during presentation
24. Rewards - Give chocolate to audience members who participate
25. Storytelling
26. Homework - Ask audience to write a take-a-way/application point on a postcard they self-address; mail it to them a few weeks later as a reminder
27. PowerPoint (but only if low on text and heavy on pictures – people remember pictures visually better than words)
28. Table Clinics AKA Speed Dating (expert at each table leads interactive discussion on set topic. Attendees switch tables and topics every 10 – 20 minutes)
29. Rapid Fire short presentations by multiple experts followed by table clinics
30. Trouble Shooting Tribes – Give an assignment to each group and ask them to report back with their response to the assignment
31. Puzzles
32. Road Shows

Obstacles to Incorporating Interactivity in CLE Programs

1. Audience resistance or resentment
2. Speaker and staff resistance to change
3. Planning and Preparation take more time
4. Making it relevant can be difficult
5. Speakers and planner don't have training in how to do it
6. Requires more resources
7. Requires more space for movement
8. May require technology expenses (polling units, etc)
9. General cultural resistance to the change to interactivity in CLE
10. May not translate into a good format for remote audiences in live webcasts
11. Many lawyers say they prefer lecture format, maybe because there is not embarrassment factor and it is easier

How to overcome the Obstacles

1. Invite speakers to "experience" an interactive presentation
2. Train the trainer instruction sessions or videos (optional or required)
3. Give presenters the reasons they should use interactivity (show them the higher speaker scores, get testimonials from other speakers who use it, involve your speakers who are converts to the interactivity in training, etc.)
4. Share the educational research that shows how much better interactivity is for learners
5. Eliminate the embarrassment factor – help speakers learn to use it in non-threatening ways, try it in small groups, use topics with no right answer
6. Give everyone an important role
7. Short training videos
8. Appeal to the egos of the speakers
9. Ask speaker and attendees to remember a workshop they liked
10. Show examples of good interactive presentations
11. Give presenters lots of options for interactivity
12. Honor or recognize the speakers who are using interactivity
13. Get speakers to watch themselves in lecture format and then watch an interactive format presentation
14. Warn the audience of interactivity in promotional materials
15. Chair massages for speakers who use interactivity
16. **Take baby steps and just try something!**



Miscellaneous Law Ed Policies

a. Pricing
b. Destination CLE
c. Financial Contributor

ISBA Pricing Policy on Attendance at CLE Programs By Sponsoring Section Council/Committee Members

Because there are many costs associated with presenting a CLE program – venue, materials, publicity, MCLE per capita fees, refreshments, and administrative overhead costs – all sponsoring section council/committee members attending are required to register and pay fees, with the following exceptions and conditions:

1) Speakers and one Moderator per program are registered for and earn MCLE credit for their programs at no charge and may be reimbursed in accordance with ISBA Law Ed reimbursement policies.
2) Additional moderators beyond the moderator designated in (1) above and program coordinators may register and attend at the New Attorney Member rate for the specific program.
3) Sponsoring section council/committee members are entitled to a $10 discount on registration fees for half-day and full-day programs. (Membership in more than one sponsoring entity does not entitle attendee to multiple $10 discounts.)
4) Registration fees apply regardless of whether a sponsoring section council/committee member seeks to earn MCLE credit for the program.

ISBA recognizes the contributions of our section council and committee members in conducting the work of the Association. ISBA duly records and tracks the free MCLE credits earned by members at section council and committee meetings that qualify under Supreme Court Rule 795(d)(3).

Adopted May 5, 2007; Revised Feb 18, 2013 -- CLE Committee

ISBA Pricing Policy on CLE for a Legal Services Attorney

A Legal Services Attorney may attend specified ISBA Law Ed programs at a reduced fee ($25 for ISBA members/$75 non-member half day and $100 non-member full day), if the attorney submits to ISBA a written request to attend the program, at least 10 days prior to the program, with documentation that the attorney:

1. works for a not-for-profit, non-governmental organization whose mission is to provide quality civil legal assistance to low-income persons; and
2. works in either:
    a. a full-time position; or
    b. a part-time position and the attorney receives no income through the practice of law, unless the income is paid by the Legal Services entity.

CLE Program Pricing Policy
for
Special Pricing Requests

The CLE committee is charged with overseeing ISBA's educational services and works to ensure that ISBA Law Ed provides the best CLE to enhance professionalism and to promote the successful practice of ISBA members. The committee is also charged with confirming that ISBA Law Ed complies with the Illinois Supreme Court MCLE Rules (S. Ct. Rules 790 - 799) Those rules set the standards for CLE program accreditation:

> (1)The course or activity must have significant intellectual, educational or practical content, and its primary objective must be to increase each participant's professional competence as an attorney.
>
> (2) The course or activity must deal primarily with matters related to the practice of law.
> S. Ct. Rule 795 (a)(1) and (2)

Because these standards require the primary focus to be on increasing attorney competence, the CLE Committee makes sure all ISBA programs retain this focus and are geared to an attorney audience.

The CLE Committee has established standard pricing guidelines for live onsite programming and paid online CLE programs. The Committee also oversees and monitors the association's Free Online CLE member benefit -- one of the primary benefits enjoyed by ISBA members. ISBA Law Ed programming and Free CLE are subsidized by ISBA member dues and are specifically and primarily designed and targeted to serve ISBA member attorneys.

Sections and committees seeking a change in standard pricing should submit justification for the request to the CLE committee with their program proposal. The justification should include the rationale for imposing a cost on all ISBA members for the benefit that would enure only to the specific section's attendees. Special pricing that is requested after the proposal is approved and scheduled will not be considered.

Factors that will be considered in reviewing special pricing requests are:

1. The target audience
2. Who will benefit from the special pricing

3. What is the price to be paid by ISBA members attending the program compared to the attendee that is to benefit from the special pricing request
4. The impact of the special pricing request on ISBA members (members attending the program and members not attending the program)
5. The impact on other ISBA CLE programs from the special pricing
6. Whether and how the association in general will benefit from the special pricing and the scope of that benefit (for example, will ISBA reach non-member attorneys who might then consider joining ISBA with the special pricing?)
7. Whether ISBA branding will be preserved and promoted
8. Whether financial contributors are identified to help cover costs
9. The impact of the special pricing on ISBA resources (will additional resources or staff time be required for the non-member beneficiaries of the special pricing and if so, what is the benefit to the association?)
10. The impact on the ISBA CLE budget
11. Whether the ISBA member educational experience will be enhanced

Approved by CLE committee-June 2016

ISBA Law Ed
Destination CLE Guidelines

DESTINATION CLE means a continuing legal education program sponsored by the ISBA where MCLE credit is available and the venue is located outside the state of Illinois, excluding ISBA Annual Meeting programs held outside the State of Illinois.

I. ISBA Destination CLE programs require third-party financial supporters.

II. ISBA may conduct Destination CLE with third-party financial supporters in accordance with the following:

A. A Destination CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee one year in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if target numbers are not met. The request must include:

1. Program Date
2. Identification of any potentially conflicting events
3. Preferred Location
4. Number of MCLE Hours to be offered
5. Number of Speakers to be Invited
6. Identification of potential financial supporters

B. A Complete and Final Destination CLE Program Proposal must be submitted to the ISBA CLE committee nine months in advance of the program using standard Law Ed proposal forms and must identify confirmed financial supporters and amount pledged, program and topic descriptions, confirmed speakers, and other standard proposal information.

C. Only programs designed to break even or better on costs (based on ISBA CLE Committee revenue/expense estimates) will be offered. Target registration numbers will be established by set dates to determine if the program will meet this goal or if the program will be cancelled.

D. Master Series Speakers in the vicinity of the destination program are encouraged to reduce reimbursement expenses.

E. If volunteer speakers are used, they must be ISBA members, unless affiliated with the financial supporters.

F. Destination CLE reimbursements for speakers and moderators shall comply with current ISBA Law Ed speaker reimbursement policies for in-state Law Ed programs.

G. A section or committee may propose a destination CLE program no more than once during an ISBA fiscal year from July 1 – June 30

H. ISBA will be the contracting party and will review and approve the hotel contract for the Destination CLE to ensure the ISBA is properly protected and that the terms are appropriate and reasonably consistent with other ISBA hotel contracts.

I. The program will comply with MCLE Board Accredited Provider standards.

J. Financial supporters of ISBA Destination CLE shall sign a Letter of Understanding drafted by the ISBA and documenting the obligations of the supporter. Issues that shall be addressed in the Letter of Understanding include, but are not limited to:

1. Speaker reimbursement terms
2. Hotel expense responsibilities
3. Acknowledgments that any financial supporter materials provided for the Law Ed course book will be in accordance with ISBA copyright permission requirements
4. Trademark uses
5. Rejection of joint venture or agency status
6. Agreement that the financial supporter's presentation at the Law Ed program, if any, will not be merely a sales pitch
7. Agreement that the financial supporter will not misrepresent its arrangement with ISBA in any future marketing to Illinois lawyers
8. Designation of responsibilities for books, MCLE credit tracking, etc.
9. Financial supporter use of or references to the ISBA name in advertising or other financial supporter materials
10. Various other standard contract terms

K. Third-Party Financial Supporters

1. Agreements with third-party financial supporters shall be consistent with other contracts held by the ISBA.
2. Opportunities for financial supporters:
a. Exhibitor opportunities at the CLE event
b. Opportunities to collect business cards/contact information from attendees
c. Speaking opportunities at the event, if:
- The topics are creditable as MCLE
- The speaker does not market the product during the presentation

3. Financial supporters may not represent that their financial support of an ISBA event is an endorsement by ISBA of their products or services

Adopted by CLE committee October 2011.Revised May 2014

ISBA Law Ed
Financial Contributor Subsidized CLE Guidelines

FINANCIAL CONTRIBUTOR SUBSIDIZED CLE means a continuing legal education program sponsored by the ISBA where MCLE credit is available and the venue is located in Illinois and the section or committee proposing the program requests pricing lower than the standard ISBA CLE pricing, with the difference to be covered by the financial contributor contribution.

I. ISBA Financial Contributor Subsidized CLE programs require compliance with the financial contributor policy (See Attached Policy)

II. ISBA may approve Financial Contributor Subsidized CLE with third-party financial supporters in accordance with the following:

A. A Financial Contributor Subsidized CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee nine months in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if funding is not timely received. The request must include:

1. Program Date
2. Identification of any potentially conflicting events
3. Preferred Location
4. Number of MCLE Hours to be offered
5. Number of Speakers to be Invited
6. Identification of potential financial supporters and amounts to be collected
7. Proposed pricing of program

B. A Complete and Final financial Contributor Subsidized CLE Program Proposal must be submitted to the ISBA CLE committee six months in advance of the program using standard Law Ed proposal forms and must identify confirmed financial supporters and amount pledged, program and topic descriptions, confirmed speakers, and other standard proposal information.

C. Only programs designed to break even or better on costs (based on ISBA CLE Committee revenue/expense estimates) will be approved with subsidized pricing. Financial Contributor payment deadlines will be established by set dates to determine if the program will meet this goal or if the program will be cancelled.

D. Single venue programs are required to control reimbursement expenses

E. If volunteer Illinois attorney speakers are used, they must be ISBA members, unless affiliated with the financial supporters.

F. Financial Contributor Subsidized CLE reimbursements for speakers and moderators shall comply with current ISBA Law Ed speaker reimbursement policies for in-state Law Ed programs.

G. A section or committee may propose a Financial Contributor Subsidized CLE program no more than twice during an ISBA fiscal year from July 1 – June 30

H. ISBA will be the contracting party and will review and approve the venue contract for the Financial Contributor Subsidized CLE to ensure the ISBA is properly protected and that the terms are appropriate and reasonably consistent with other ISBA venue contracts.

I. The program will comply with MCLE Board Accredited Provider standards.

J. Financial supporters of ISBA Financial Contributor Subsidized CLE shall sign a Letter of Understanding drafted by the ISBA and documenting the obligations of the supporter. Issues that shall be addressed in the Letter of Understanding include, but are not limited to:

1. Speaker reimbursement terms
2. Venue expense responsibilities
3. Acknowledgments that any financial supporter materials provided for the Law Ed course book will be in accordance with ISBA copyright permission requirements
4. Trademark uses
5. Rejection of joint venture or agency status
6. Agreement that the financial supporter's presentation at the Law Ed program, if any, will not be merely a sales pitch
7. Agreement that the financial supporter will not misrepresent its arrangement with ISBA in any future marketing to Illinois lawyers
8. Designation of responsibilities for books, MCLE credit tracking, etc.
9. Financial supporter use of or references to the ISBA name in advertising or other financial supporter materials
10. Various other standard contract terms

K. Third-Party Financial Supporters

1. Agreements with third-party financial supporters shall be consistent with other contracts held by the ISBA.
2. Opportunities for financial supporters:
   a. Exhibitor opportunities at the CLE event
   b. Opportunities to collect business cards/contact information from attendees
   c. Speaking opportunities at the event, if:
      - The topics are creditable as MCLE
      - The speaker does not market the product during the presentation
3. Financial supporters may not represent that their financial support of an ISBA event is an endorsement by ISBA of their product or services.

Adopted by CLE committee 9/20/14

ISBA Law Ed Financial Contributor Policy

Financial contributors may support ISBA's Law Ed programs if the issues listed below are addressed to the satisfaction of the ISBA and the financial contributor. Upon confirmation of a financial contributor's pledge to support ISBA's Law Ed program, ISBA will draft a Letter of Understanding for the Financial Supporter's signature documenting the obligations of the supporter. ISBA will also request payment of the amount pledged and will invoice the financial supporter, if necessary. Please note: ISBA is a 501(c)(6) organization, and not a 501(c)(3) charitable organization. A contributor should contact a tax professional to determine if the contribution has tax consequences.

Issues that shall be addressed in the Letter of Understanding include, but are not limited to:

1. Speaker reimbursement terms, if speaking
2. Hotel expense responsibilities, if any
3. Acknowledgments that any financial supporter materials provided for the Law Ed course book will be in accordance with ISBA copyright permission requirements
4. Restrictions on the use of ISBA trademarks
5. Rejection of joint venture or agency status
6. Agreement that the financial supporter will not misrepresent its arrangement with ISBA in any future marketing to Illinois lawyers
7. Designation of responsibilities for books, MCLE credit tracking, etc.
8. Financial supporter use of or references to the ISBA name in advertising or other financial supporter materials
9. Agreement that the financial supporter's presentation at the Law Ed program, if any, will not promote the relative merits of any particular product or service (other than ISBA products or services). However, with prior approval of the CLE committee, the presentation may focus on how to better use a specific product.
10. Various other standard contract terms

Third-Party Financial Supporters

1. Agreements with third-party financial supporters shall be consistent with other contracts held by the ISBA.
2. Opportunities for financial supporters:
    - **a.** Recognition in pre-program marketing materials and in the course book at the program. ISBA may recognize the supporters by levels, such as gold, silver, bronze, or by event, such as lunch, break or reception sponsor.
    - **b.** Exhibitor opportunities at the CLE event
    - **c.** Opportunities to collect business cards/contact information from attendees
    - **d.** Speaking opportunities at the event, if:
        - The topics are creditable as MCLE
        - The speaker does not market the product during the presentation
3. Financial supporters may not represent that their financial support of an ISBA event is an endorsement by ISBA of their products or services

Sections or committees hosting Law Ed programs which include financial supporters should provide the following information with the program proposal:

1. Contributor's Name for Publicity
2. Contributor Contact name, address, phone and email
3. Amount Pledged

Adopted by the CLE committee June 2, 2012