Empowering You to Hit Your ISBA CLE Target
# TABLE OF CONTENTS

## KNOW YOUR CLE TARGET
- CLE Coordinator Role and Benefits 3
- Programming Expectations 5
- Proposal Deadlines 9
- CLE Committee Long Range Planning Goals and Objectives 10

## ISBA’S CLE COORDINATOR RESOURCES FOR PLANNING
- ISBA webpage at [www.isba.org/cle/coordinators](http://www.isba.org/cle/coordinators)
- Top 50 On-Demand Programs Last Year 11
- On-Demand Catalog Topic Review 14
- Accreditation Extension Request Form 16
- Proposal Form – Live On-Site 17
- Proposal Form – Live Web 23
- Example Program Proposals – Live and Web 25
- Table Clinic Options and Templates 33
- Planning Panel Presentations 36
- Faculty Recruitment 37
- Developing and Incorporating Polling Questions 38

## ISBA CLE COMMITTEE AND STAFF SUPPORT
- List of Coordinators and Liaisons 39
- Role of CLE Liaison 40
- Annual CLE Report 41
- CLE Program Flow Chart 42
- Law Ed Promotions 46
- Sample Evaluation Forms 48
- Sample Speaker Packet
  - Email to Speakers 51
  - General Information 53
  - Sample Speaker Invitation 55
  - Presentation Agreement 56
- Law Ed Faculty Resources – [www.isba.org/cle/faculty](http://www.isba.org/cle/faculty)
  - Video Resources 58
  - Materials Guidelines 59
  - Using Power Point to Present Your Lecture 63
  - On-Camera Presentation Tips 67
  - PMCLE Presenter Tips 68
  - Options for Interactivity 69

## MISCELLANEOUS LAW ED POLICIES
- Pricing 71
- Destination CLE 74
- Financial Contributor/Subsidized CLE 76
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](http://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](http://www.isba.org/cle/coordinators)
Section & Committee Annual CLE Programming Expectations – FY 2020-21
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.

<table>
<thead>
<tr>
<th>Section</th>
<th>Requested Hours of CLE Content to Produce for On-Demand Catalog</th>
<th>“PRACTICE READY” BASICS CLE INITIATIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Law</td>
<td>2</td>
<td>Please include:</td>
</tr>
<tr>
<td>Agricultural Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Alternative Dispute Resolution</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Animal Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Bench and Bar</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Business Advice, Collections, &amp; Financial Planning</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Business &amp; Securities Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Cannabis Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Child Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Section</td>
<td>Requested Hours for On-Demand Catalog</td>
<td>“PRACTICE READY” BASICS CLE INITIATIVE Please include:</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Civil Practice &amp; Procedure</td>
<td>20</td>
<td>3 hours basics</td>
</tr>
<tr>
<td>Commercial Banking, Collections, &amp; Bankruptcy</td>
<td>5</td>
<td>2 hours basics</td>
</tr>
<tr>
<td>Construction Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Corporate Law Departments</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Criminal Justice</td>
<td>10</td>
<td>2 hours basics</td>
</tr>
<tr>
<td>Education Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Elder Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Energy Utilities Trans &amp; Tele</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Environmental Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Family Law</td>
<td>20</td>
<td>3 hours basics</td>
</tr>
<tr>
<td>Federal Civil Practice</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Federal Taxation</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Food Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>General Practice, Solo/Small Firm</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Health Care</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Human Rights</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Insurance Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Intellectual Property</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>International &amp; Immigration Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Labor &amp; Employment Law</td>
<td>10</td>
<td>2 hours basics</td>
</tr>
<tr>
<td>Local Government Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Mineral Law</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Privacy &amp; Information Security Law</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Real Estate</td>
<td>20</td>
<td>3 hours basics</td>
</tr>
<tr>
<td>Senior Lawyers</td>
<td>2</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>State &amp; Local Taxation</td>
<td>5</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Tort Law</td>
<td>10</td>
<td>2 hours basics</td>
</tr>
<tr>
<td>Traffic Laws &amp; Courts</td>
<td>10</td>
<td>2 hours basics</td>
</tr>
<tr>
<td>Trusts &amp; Estates</td>
<td>20</td>
<td>3 hours basics</td>
</tr>
<tr>
<td>Workers’ Compensation</td>
<td>10</td>
<td>1 hour basics</td>
</tr>
<tr>
<td>Young Lawyers Division</td>
<td>20</td>
<td>3 hours basics</td>
</tr>
</tbody>
</table>
## Committees

<table>
<thead>
<tr>
<th>Committee</th>
<th>Requested Hours of CLE Content for CLE On-Demand Catalog</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee on ARDC</td>
<td>2</td>
</tr>
<tr>
<td>Committee on Corrections &amp; Sentencing</td>
<td>5</td>
</tr>
<tr>
<td>Standing Committee on Delivery of Legal Services</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Government Lawyers</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Law Office Management &amp; Economics</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Legal Technology</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Mental Health Law</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Military Affairs</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Racial &amp; Ethnic Minorities</td>
<td>5</td>
</tr>
<tr>
<td>Committee on Sexual Orientation &amp; Gender Identity</td>
<td>5</td>
</tr>
<tr>
<td>Standing Committee on Women &amp; the Law</td>
<td>5</td>
</tr>
</tbody>
</table>

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](http://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 COUNTS - 4/30/2020

<table>
<thead>
<tr>
<th>Code</th>
<th>Section Name</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin</td>
<td>Administrative Law</td>
<td>157</td>
</tr>
<tr>
<td>ADR</td>
<td>Alternative Dispute Resoltn</td>
<td>189</td>
</tr>
<tr>
<td>agrcul</td>
<td>Agricultural Law</td>
<td>229</td>
</tr>
<tr>
<td>animal</td>
<td>Animal Law</td>
<td>85</td>
</tr>
<tr>
<td>BNCBR</td>
<td>Bench &amp; Bar</td>
<td>192</td>
</tr>
<tr>
<td>BUSSEC</td>
<td>Business &amp; Securities</td>
<td>419</td>
</tr>
<tr>
<td>CANNASIS</td>
<td>Cannabis Law (complimentary membership only at this time)</td>
<td>1,094</td>
</tr>
<tr>
<td>CHLDLW</td>
<td>Child Law</td>
<td>191</td>
</tr>
<tr>
<td>CIVLPP</td>
<td>Civil Practice</td>
<td>1,492</td>
</tr>
<tr>
<td>CNSTRN</td>
<td>Construction Law</td>
<td>225</td>
</tr>
<tr>
<td>COMBNK</td>
<td>Commercial Banking</td>
<td>530</td>
</tr>
<tr>
<td>CORPLW</td>
<td>Corporate Law Dept.</td>
<td>268</td>
</tr>
<tr>
<td>CRMJUS</td>
<td>Criminal Justice</td>
<td>641</td>
</tr>
<tr>
<td>EDUCAT</td>
<td>Education Law</td>
<td>170</td>
</tr>
<tr>
<td>ELDER</td>
<td>Elder Law</td>
<td>518</td>
</tr>
<tr>
<td>EMPBEN</td>
<td>Employee Benefits</td>
<td>128</td>
</tr>
<tr>
<td>ENERGY</td>
<td>Energy, Utilities, Transportation &amp; Telecommunications</td>
<td>78</td>
</tr>
<tr>
<td>ENVIRO</td>
<td>Environmental Law</td>
<td>174</td>
</tr>
<tr>
<td>FAMILY</td>
<td>Family Law</td>
<td>1,502</td>
</tr>
<tr>
<td>FEDPRC</td>
<td>Federal Civil Practice</td>
<td>218</td>
</tr>
<tr>
<td>FEDTAX</td>
<td>Federal Tax</td>
<td>278</td>
</tr>
<tr>
<td>FOOD</td>
<td>Food Law (complimentary membership only at this time)</td>
<td>277</td>
</tr>
<tr>
<td>GENPRC</td>
<td>General Practice</td>
<td>540</td>
</tr>
<tr>
<td>HLTCAR</td>
<td>Health Care</td>
<td>291</td>
</tr>
<tr>
<td>HUMRTS</td>
<td>Human Rights</td>
<td>58</td>
</tr>
<tr>
<td>INSLAW</td>
<td>Insurance Law</td>
<td>373</td>
</tr>
<tr>
<td>INTIMM</td>
<td>International Law</td>
<td>139</td>
</tr>
<tr>
<td>INTRPRP</td>
<td>Intellectual Property</td>
<td>247</td>
</tr>
<tr>
<td>LAWOFIC</td>
<td>Law Office Management and Economics</td>
<td>208</td>
</tr>
<tr>
<td>LBREMP</td>
<td>Labor &amp; Employment</td>
<td>657</td>
</tr>
<tr>
<td>LGLTCH</td>
<td>Legal Technology</td>
<td>206</td>
</tr>
<tr>
<td>LOCGOV</td>
<td>Local Government</td>
<td>422</td>
</tr>
<tr>
<td>MINRAL</td>
<td>Mineral Law</td>
<td>59</td>
</tr>
<tr>
<td>MNTHLT</td>
<td>Mental Health Law</td>
<td>107</td>
</tr>
<tr>
<td>PRIVACY</td>
<td>Privacy &amp; Information Security Law</td>
<td>250</td>
</tr>
<tr>
<td>RELEST</td>
<td>Real Estate</td>
<td>1,692</td>
</tr>
<tr>
<td>SRLLWYR</td>
<td>Senior Lawyers (complimentary membership only at this time)</td>
<td>8,945</td>
</tr>
<tr>
<td>STLCX</td>
<td>State &amp; Local Tax</td>
<td>257</td>
</tr>
<tr>
<td>TORT</td>
<td>Tort Law</td>
<td>908</td>
</tr>
<tr>
<td>TRAFFC</td>
<td>Traffic Laws &amp; Courts</td>
<td>435</td>
</tr>
<tr>
<td>TRUSTS</td>
<td>Trusts &amp; Estates</td>
<td>1,666</td>
</tr>
<tr>
<td>WRKCOMP</td>
<td>Workers' Compensation</td>
<td>553</td>
</tr>
<tr>
<td>YLD</td>
<td>Young Lawyers Division (complimentary membership only at this time)</td>
<td>13,126</td>
</tr>
</tbody>
</table>
2020-2021 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 FY20-21 term, please plan programs that will occur between December of 2020 and November of 2021. The proposal form is available at [http://www.isba.org/cle/coordinators](http://www.isba.org/cle/coordinators).

### Live Onsite Programs

<table>
<thead>
<tr>
<th>Submission Deadline</th>
<th>Presentation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 15th</td>
<td>December or January</td>
</tr>
<tr>
<td>September 15th</td>
<td>February or March</td>
</tr>
<tr>
<td>November 15th</td>
<td>April or May</td>
</tr>
<tr>
<td>January 15th</td>
<td>June</td>
</tr>
<tr>
<td>March 15th</td>
<td>September</td>
</tr>
<tr>
<td>May 15th</td>
<td>October or November</td>
</tr>
</tbody>
</table>

### Webcast or Webinar Presentations

<table>
<thead>
<tr>
<th>Submission Deadline</th>
<th>Presentation Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 15th</td>
<td>October or November</td>
</tr>
<tr>
<td>September 15th</td>
<td>December or January</td>
</tr>
<tr>
<td>November 15th</td>
<td>February or March</td>
</tr>
<tr>
<td>January 15th</td>
<td>April or May</td>
</tr>
<tr>
<td>March 15th</td>
<td>June</td>
</tr>
<tr>
<td>May 15th</td>
<td>September</td>
</tr>
</tbody>
</table>
ISBA CLE COMMITTEE
Long Range Planning
Goals and Objectives
August 2018 Updated August 2019, November 2019, December 2019

ISBA CLE Mission
ISBA Law Ed will provide the best CLE to enhance the professional competence of ISBA members.

ISBA CLE Goals – 2018

1. Increase and retain ISBA membership through CLE
2. Focus on Online CLE catalog content to better serve our primary member CLE audience (online) and better use ISBA’s limited resources through a planned curriculum that defines and generates the necessary core content, with special emphasis on new attorney content
3. Improve quality of all programs—substance, speakers, materials and delivery—especially online CLE programming and user experiences

Critical Next Steps to Achieve ISBA CLE Goals
With Subcommittee Assignments

<table>
<thead>
<tr>
<th>Critical Next Steps To Achieve ISBA Goals</th>
<th>Subcommittee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review online catalog to identify missing content and develop processes to fill those voids</td>
<td></td>
</tr>
<tr>
<td>Work to identify and generate a complete online catalog of New Attorney CLE content with short “just-in-time” CLE segments</td>
<td></td>
</tr>
<tr>
<td>Develop new and younger faculty members</td>
<td>Faculty Development Subcommittee</td>
</tr>
<tr>
<td>Review and refine role of CLE coordinator – appointments, expectations, training, support and recognition</td>
<td>CLE Coordinator Subcommittee</td>
</tr>
</tbody>
</table>

Highly Important Next Steps to Achieve ISBA CLE Goals
With Subcommittee Assignments

<table>
<thead>
<tr>
<th>Highly Important Next Steps To Achieve ISBA Goals</th>
<th>Focus Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Explore the idea of an ISBA CLE program attorney position</td>
<td>Programming Subcommittee</td>
</tr>
<tr>
<td>Explore certification programs</td>
<td>Programming Subcommittee</td>
</tr>
</tbody>
</table>

Staff Driven Projects
Explore Procertus Programming
Top 50 Online CLE Programs

May 2019 – May 2020

(Ranked by total number of orders for the past year)

Excludes the 10 Hours Free Programming Offered March 20 – May 15, 2020

1. Diversity and Inclusion in the Practice of Law - Presented by the ISBA Standing Committee on Law Office Management and Economics and the ISBA Diversity Leadership Council

2. 60 Legal Tech Tips, Tricks, Gadgets and Websites in 60 Minutes - Practice Toolbox Series

3. Professionalism 2018: Understanding How Mental Health/Substance Abuse and Diversity/Inclusion Are Impacting the Legal Profession - Presented by the ISBA General Practice, Solo and Small Firm Section

4. ISBA Basic Skills for Newly Admitted Attorneys – 2018

5. Civil Practice and Procedure Update: Pleadings, Motions, Discovery, and Resolving Cases through Settlement and Mediation - Presented by the ISBA Civil Practice & Procedure Section

6. 60 Tips in 60 Minutes - Presented by the ISBA Committee on Legal Technology as part of the "Legal Technology 101" Program


8. 8 Things Killing Your Law Firm - And How to Stop Them - Practice Toolbox Series

9. 2020 Traffic Case Law and Legislative Update - Presented by the ISBA Traffic Laws & Courts Section

10. Cannabis Law: What You Need to Know to Represent Cannabis Businesses and Investors - Presented by the ISBA Health Care Law Section


13. Evidence: Foundation Issues, Objections, and Effective Presentation to Maximize Proof - Presented by the ISBA Civil Practice & Procedure Section

14. Mindfulness in the Age of Technology: Coping with the Stresses of the Profession

15. Unconscious Bias: The Impact on the Legal Profession and the Justice System - Presented by the ISBA Environmental Law Section

16. Estate Planning Update – 2019 - Presented by the ISBA General Practice, Solo and Small Firm Section as part of the

17. Advancing Your Firm: Personal Branding for the Female Lawyer - Presented by the ISBA Standing Committee on Women & the Law
<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Presenting Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>18</td>
<td>Hot Topics in Trial: Jury Selection and Jury Questions</td>
<td>Presented by the ISBA Tort Law Section</td>
</tr>
<tr>
<td>19</td>
<td>Diversity in the Judiciary</td>
<td>Presented by the Illinois State Bar Association, Cook County Bar Association, Black Women Lawyers Association, and Hispanic Lawyers Association</td>
</tr>
<tr>
<td>20</td>
<td>Blockchain 101: Technical Concepts, Legal and Business Issues</td>
<td>Presented by the ISBA Civil Practice &amp; Procedure Section</td>
</tr>
<tr>
<td>21</td>
<td>Advice from the Bench</td>
<td>Presented by the ISBA General Practice, Solo &amp; Small Firm Section</td>
</tr>
<tr>
<td>22</td>
<td>Real Estate Law Update – 2018</td>
<td>Presented by the ISBA Real Estate Law Section</td>
</tr>
<tr>
<td>23</td>
<td>Your Health and Wellness Playbook: Handling the Stresses of the Profession</td>
<td>Presented by the ISBA Special Committee on Health and Wellness</td>
</tr>
<tr>
<td>24</td>
<td>Mindful Combat</td>
<td>Presented by the ISBA Environmental Law Section</td>
</tr>
<tr>
<td>25</td>
<td>Bankruptcy and Divorce</td>
<td>Presented by the ISBA Commercial Banking, Collections and Bankruptcy Section</td>
</tr>
<tr>
<td>26</td>
<td>Illinois Trust Code: What You Need to Know!</td>
<td>Presented by the ISBA Trusts &amp; Estate Law Section</td>
</tr>
<tr>
<td>27</td>
<td>Give Peace a Chance: Steering the Parties through Mediation</td>
<td>Presented by the Illinois State Bar Association / Co-Sponsored by the ISBA Alternative Dispute Resolution Section</td>
</tr>
<tr>
<td>28</td>
<td>5th Annual Elder Law Bootcamp: Basics and Beyond</td>
<td>Presented by the ISBA Elder Law Section</td>
</tr>
<tr>
<td>29</td>
<td>Civil Practice Update Fall 2019</td>
<td>Presented by the ISBA Civil Practice and Procedure Law Section</td>
</tr>
<tr>
<td>30</td>
<td>Email is Killing Me! How to Better Manage Your Email</td>
<td>Practice Toolbox Series</td>
</tr>
<tr>
<td>31</td>
<td>2019 Traffic Case Law &amp; Legislative Update: Changes That Impact Your Practice and Clients</td>
<td>Presented by the ISBA Traffic Laws &amp; Courts Section</td>
</tr>
<tr>
<td>32</td>
<td>2018 Traffic Case Law and Legislative Update: Changes Which Impact Your Practice &amp; Clients</td>
<td>Presented by the ISBA Traffic Laws and Courts Section</td>
</tr>
<tr>
<td>33</td>
<td>2019 Federal Tax Conference</td>
<td>Presented by the ISBA Federal Tax Section</td>
</tr>
<tr>
<td>34</td>
<td>Commercial Real Estate Transactions - The Basics</td>
<td>Presented by the ISBA General Practice, Solo and Small Firm Section</td>
</tr>
<tr>
<td>35</td>
<td>Dropbox for Lawyers, Part 1</td>
<td>Practice Toolbox Series</td>
</tr>
<tr>
<td>36</td>
<td>Enforcing Illinois’ Eviction Laws: A Basic Guide to Landlord Remedies and Tenant Rights</td>
<td>Presented by the ISBA Real Estate Law Section</td>
</tr>
<tr>
<td>37</td>
<td>GAL; Child Representative: Access to Justice and Cultural Competency Issues [4.0 Hours]</td>
<td>Presented by the ISBA Family Law Section</td>
</tr>
<tr>
<td>38</td>
<td>ADR 2019: Using Alternative Dispute Resolution to Navigate Rights - Part 1</td>
<td>Presented by the ISBA Alternative Dispute Resolution Section</td>
</tr>
<tr>
<td>39</td>
<td>Advice from a Solo Practitioner</td>
<td>Presented by the ISBA General Practice, Solo &amp; Small Firm Section</td>
</tr>
<tr>
<td>40</td>
<td>Alternative Dispute Resolution in Intellectual Property Cases</td>
<td>Presented by the ISBA Intellectual Property Section</td>
</tr>
<tr>
<td>41</td>
<td>2018 Loss Prevention Bootcamp</td>
<td>Presented by the ISBA Mutual Insurance Company</td>
</tr>
</tbody>
</table>
42. GDPR and BIPA: What General Counsel and Privacy Attorneys Need to Know - *Presented by the ISBA Corporate Law Section*
43. Family Law "How To": 15. Party Depositions - *Presented by the ISBA Family Law Section*
44. Family Law Update 2018 - *Presented by the ISBA Family Law Section*
45. The Hot Seat: Taking and Defending Depositions - *Presented by the ISBA Tort Law Section*
46. Champagne Technology on a Beer Budget – *Part of the SSF Practice Institute Series*
47. Efficient Time, Billing, and Accounting for a Small Law Firm - *Presented by the Illinois State Bar Association*
48. The Nuts & Bolts of LLC Taxation - *Presented by the ISBA Business and Securities Law Section*
49. Mastering the Dead Man’s Act - *Presented by the ISBA Trusts & Estates Section*
50. Concerted Activity in the Age of Social Media and Online Systems: Employee Rights, Employer Pitfalls, Remedies, and Penalties - *Presented by the ISBA Labor & Employment Law Section*
51. Civility and Professionalism 2019: Properly Handling Emerging Issues with Competence - *Presented by the ISBA Bench and Bar Section*
Ways to Identify Current Online CLE Content for an ISBA Section or Committee

OPTION 1:
1. Go to [www.isba.org/cle/coordinators](http://www.isba.org/cle/coordinators) and select the link to “current Online CLE programs”:

   CLE Program Planning Requirements and Resources

   Coordinator Planning Information
   - Check your section’s or committee’s current Online CLE programs to identify and plan for missing topics in your next program.
   - CLE Coordinator Playbook
   - Checklist for CLE Coordinators
   - Example Agendas

2. Select your group from the list of sections and committees at [www.isba.org/cle/coordinators/programs](http://www.isba.org/cle/coordinators/programs) and view current available content sponsored by that section or committee. If a section or committee doesn’t appear then there are no current programs.
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 new lawyers and practice ready basics 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:
To the ISBA CLE Department, Attn: Ashley Daggett,
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 / Email: adaggett@isba.org

WE WILL NOTIFY YOU WHEN THE EXTENSION IS COMPLETED.
Please complete the following template and proposal information, adjusting as necessary.

A. **Proposed Program Title** *(keep it short, simple and catchy!)*

B. **Presented by:** *(Sponsoring Section(s)/Committee(s))*

C. **Co-sponsored by:** *(optional, but co-sponsoring sections/committees get discounts and broaden marketing base)*

D. **Location – City/Venue**

E. **Date(s) requested** *(Check Master Curriculum Calendar or confirm availability with ISBA staff)*

F. **Program times** *(Minimum of 3.5 hours MCLE for live onsite audience. Shorter programs are webcasts/webinars. Indicate hours, full, or half-day)*

G. **I request a simultaneous Live Webcast of the program.**

H. **[ ]** hour(s) MCLE credit, including **[ ]** hour(s) Professional Responsibility MCLE credit in the following category(ies) *(PMCLE not required, but if offered, must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs):*
   - **[ ]** hour(s) Professionalism, Civility, or Legal Ethics MCLE credit *(not required)*
   - **[ ]** hour(s) Mental Health and Substance Abuse MCLE credit *(not required)*
   - **[ ]** hour(s) Diversity and Inclusion MCLE credit *(not required)*

I. **Topics Covered:**

J. **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?*
   - Learning objective 1
   - Learning objective 2
   - Learning objective 3 . . . *(add more as needed)*

K. **Practice Level Targeted:**
   - Basic
   - Intermediate
   - Advanced

Program Coordinator(s):
**Name, Firm, Address, Telephone Number, E-mail Address**

Program Moderator(s):
**Name, Firm, Address, Telephone Number, E-mail Address**

- Check the box if the segment could be a stand-alone program or a practice ready basics program for new attorneys in the on-demand CLE catalog - to satisfy the increasing member demand for shorter, just-in-time learning segments.
- Adjust template segment times below in quarter hour increments, minimum 30 minutes, and add speakers as needed
TIME Welcome and Announcements (suggested start time: 8:30-9:00 a.m. for a full day or morning only program or 12:30-1 p.m. for an afternoon only program)

TIME Topic 1
Description (2-3 sentences)
Speaker, Firm, Address, Telephone Number, E-mail Address
☐ Could be stand-alone program in on-demand CLE catalog
☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

TIME Topic 2
Description (2-3 sentences)
Speaker, Firm, Address, Telephone Number, E-mail Address
☐ Could be stand-alone program in on-demand CLE catalog
☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

TIME Break (beverages provided)

TIME Topic 3
Description (2-3 sentences)
Speaker, Firm, Address, Telephone Number, E-mail Address
☐ Could be stand-alone program in on-demand CLE catalog
☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

For full day programs, include the following:

TIME Lunch ☐ on your own ☐ provided by ISBA (we will add $15 to fee) ☐ sponsored by financial contributor, indicate name and contact information

TIME Topics 4, 5, 6, etc. (Full day programs should go until at least 4:00 p.m.)
Description (2-3 sentences)
Speaker, Firm, Address, Telephone Number, E-mail Address
☐ Could be stand-alone program in on-demand CLE catalog
☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

15 Minute Break will be added in the afternoon (refreshments provided)

*Professional Responsibility MCLE credit subject to approval

Additional Information

A. Financial Contributors (optional): ☐ 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: ______

B. ☐ (optional) I Request ISBA’s assistance in setting up a pre-program teleconference with all panelists/speakers.

C. Publications (optional): To help with program promotion, 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. ______

For marketing, 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
☐ Cannabis
☐ 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
☐ Food Law
☐ 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
☐ Privacy & Security 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.)

Additional Steps
1. Review the following “CLE Coordinator Checklist” prior to completing your proposal.
2. Distribute the attached “Law ED Presenter Information” to your confirmed speakers. (also available online at www.isba.org/cle/coordinators)
3. Attach any additional program agenda information to this completed form in Microsoft Word and send to:

CLE Department, Attn: CLE Program Coordinator
ISBAProgramCoordinator@isba.org
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701

Thank you for your proposal!
CHECKLIST FOR CLE COORDINATORS

Program Composition

Did you...
- Identify the program’s “learning objectives” – that is, what attendees will take away, why they should attend this program, what specific needs will be addressed?
- Identify the type of practitioners and level of practice experience for which the program is designed – and then schedule the speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks?
- Schedule an identifiable segment of Professional Responsibility credit, if included, of not less than one hour for full day programs and not less than one-half hour for half day programs, in increments of 15 minutes?
- Provide two to three sentence descriptions for each session, including what the attendees will learn?
- Incorporate Questions and Answers into the program, rather than ending the seminar with a Q and A session (unless you’re preparing questions in advance to make sure the full advertised MCLE credit time is provided)?

Presenter Recruitment

Did you...
- Recruit the best, most effective presenters on the topic, whether or not they serve on the section or committee?
- Recruit presenters who reflect the geographic, ethnic, and gender diversity of the bar?
- Recruit presenters or co-presenters who are attorneys in their first 10 years of practice as a way to train and develop new ISBA Law Ed faculty members?
- Recruit only presenters who will agree to submit materials 4 weeks prior to program so ISBA may apply for PMCLE credit and so we avoid handouts at programs since attendees attending remotely will not have access to the handouts?
- Recruit presenters who agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products?
- Recruit only presenters who will agree to be videotaped and who will sign the required Presentation Agreement?
- Recruit presenters who agree to arrive not less than 30 minutes prior to presenting?
- Recruit in-state presenters?
- Recruit presenters who are ISBA members or, in the case of non-members, invite them to join and direct them to the ISBA membership webpage at: www.isba.org/membership/join?
**Presenter Support**

*Did you...*

- Provide the attached ISBA LawEd Presenter Information to all invited speakers?
- Provide presenters with ISBA guidance on preparing materials and with other faculty resources at www.isba.org/cle/faculty?
- Provide written justification for selecting an out-of-state presenter? Please Note: Out-of-state presenters are subject to same reimbursement rates as in-state presenters:
  - Rail or coach class airfare not to exceed $350.00
  - Automobile travel costs of 40¢ per mile
  - Actual lodging at single room rates not to exceed $250 per day for one night’s lodging

**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 a single moderator or select an already-identified presenter to assist in moderating (because only one moderator will be reimbursed for travel/hotel per program. Complimentary registration is provided for one moderator for half-day programs and two moderators for full-day programs. Additional moderators can attend for $25)?
- Select a moderator who is an ISBA member and a sponsoring section council or committee member, preferably with Law Ed experience (coordinator, chair, or presenters are recommended)?

**Proposal Submission**

*Did you...*

- Provide a list of confirmed presenters and full contact information for each of them, as well as the moderator’s e-mail address and phone number?
- Type, rather than handwrite, the program proposal cover sheet and agenda?
- Submit the Program Proposal to ISBA staff on or before the submission deadline?
- Know that if your program agenda is lacking sufficient information to market and price the program by 6 weeks before 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?

**Communicating with Presenters For a Better Program**

*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, and address questions? (Contact ISBA if you would like ISBA assistance in providing you with telephone conference capabilities.)
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.
- 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.
Please complete the following template and proposal information, adjusting as necessary.

A. Proposed Program Title *(keep it short, simple and catchy!)*

B. Presented by: *(Sponsoring Section(s)/Committee(s))*

C. Co-sponsored by: *(optional, but co-sponsoring sections/committees get discounts and broaden marketing base)*

D. Presentation Format - ☐ webcast from the ISBA Chicago Office or ☐ webinar – can be presented from any location with phone and internet; Power Point Presentations are required for webinars

E. Date(s) requested *(Typically a Wednesday or Thursday)*

   If Hot Topic Expedited Date Requested, Provide Justification

F. Program Times *(Max. 1-2 hours recommended)*

   _____ hour(s) MCLE credit, including _____ hour(s) Professional Responsibility MCLE credit in the following category(ies) *(PMCLE not required, but if offered, must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs)*:
   
   • _____ hour(s) Professionalism, Civility, or Legal Ethics MCLE credit (not required)
   • _____ hour(s) Mental Health and Substance Abuse MCLE credit (not required)
   • _____ hour(s) Diversity and Inclusion MCLE credit (not required)

G. Topics Covered:

H. 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?*
   
   • Learning objective 1
   • Learning objective 2
   • Learning objective 3 . . . *(add more as needed)*

I. Practice Level Targeted: ☐ Basic ☐ Intermediate ☐ Advanced

Program Coordinator(s):

*Name, Firm, Address, Telephone Number, E-mail Address*

Program Moderator(s):

*Name, Firm, Address, Telephone Number, E-mail Address*

Topic 1, 2, 3, etc.

Description *(2-3 sentences if not covered in above description)*

*Speaker(s), Firm, Address, Telephone Number, E-mail Address*

☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog
Additional Information

A. [optional] I Request ISBA’s assistance in setting up a pre-program teleconference with all panelists/speakers.

B. Publications (optional): To help with program promotion, 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.

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

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

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

Additional Steps

Review the following “Checklist for CLE Coordinators” prior to completing your proposal.

1. Distribute the attached “Law ED Presenter Information” to your confirmed speakers. (also available online at www.isba.org/cle/coordinators)

2. Attach any additional program agenda information to this completed form in Microsoft Word and send to:

   CLE Department, Attn: CLE Program Coordinator
   ISBAProgramCoordinator@isba.org
   Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701

   Thank you for your proposal!
Please complete the following template and proposal information, adjusting as necessary.

**Proposed Program Title** (keep it short, simple and catchy!)
*Presented by Federal Taxation* (Sponsoring Section(s)/Committee(s))

Co-sponsored by _____ (optional, but co-sponsoring sections/committees get discounts and broaden marketing base)

**Location** – CITY Chicago
Date(s) requested _____ 2.7.2020 (Check Master Curriculum Calendar or confirm availability with ISBA staff)

Exact location

Illinois State Bar Association
20 South Clark, Suite 900
Chicago, IL 60603

Street Address

Program times 9 - 4:30 (Minimum of 3.5 hours MCLE for live onsite audience. Shorter programs are webcasts/webinars.)

☐ I request a simultaneous Live Webcast of the program.

6.5 hour(s) MCLE credit, including 1 hour(s) Professional Responsibility MCLE credit in the following category(ies) (PMCLE not required, but if offered, must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs):

- _____ hour(s) Professionalism, Civility, or Legal Ethics MCLE credit (not required)
- _____ hour(s) Mental Health and Substance Abuse MCLE credit (not required)
- _____ hour(s) Diversity and Inclusion MCLE credit (not required)

Increase your understanding of Federal Taxation (topic) in this full (full or half-day) seminar that examines:

- Implementation of the Tax Cuts and Jobs Act: regulatory interpretations and takeaways
- Individual Tax Update
- C-Corporation and Pass-through Entity Update
- Ethical Considerations for Illinois Attorneys
- Estate and Gift Tax Considerations Post-TCJA
- Tax Considerations for Cryptocurrency Transactions
- Tips for Advising Delinquent Taxpayers
List learning objectives below. 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? Please indicate level of practice experience targeted:

☐ Basic  X  Intermediate  ☐ Advanced

- Learning objective 1 Understand how the Tax Cuts and Jobs Act was implemented in 2019, how Treasury has interpreted the Act, and what guidance is still needed.
- Learning objective 2 Identify topical issues for 2020
- Learning objective 3 Obtain awareness of significant 2019 legal developments in the tax world.

Program Coordinator(s):
Colin J. Walsh
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

Program Moderator(s):
Colin J. Walsh
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

- Adjust template segment times below in quarter hour increments, minimum 30 minutes, and add speakers as needed
- Check the box if the segment could be a stand-alone program or a practice ready basics program for new attorneys in the on-demand CLE catalog - to satisfy the increasing member demand for shorter, just-in-time learning segments.

8:55 – 9:00 a.m. Welcome and Announcements (suggested start time: 8:30-9:00 a.m. for a full day or morning only program or 12:30-1 p.m. for an afternoon only program)

9:00 – 10 a.m. Individual Tax Update
Description (2-3 sentences) Obtain an update on the implementation of the Tax Cuts and Jobs Act. Learn important regulatory updates for individuals and case law developments.

Kathryn H. Garlow
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

☐ Could be stand-alone program in on-demand CLE catalog
☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

10 – 11 a.m. Estate and Gift Tax Update
This presentation offers an in-depth look at the changes to estate and gift tax law and the recent developments in case law.

Ryan A. Walsh
ABC Law Firm
123 Street Name Rd.
11am – 11:15 a.m. Break (beverages provided)

11:15 a.m. – 12:30 p.m. Corporate and Partnership Tax Update
Description (2-3 sentences) In this session, we’ll review significant legal developments in 2019. We will also explore regulatory interpretations of the TJCA, including 163(j) and 199A.

Philip D. Speicher
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

12:30 – 1 p.m. Lunch [ ] on your own X provided by ISBA (we will add $15 to fee) [ ] sponsored by financial contributor, indicate name and contact information ______

1 – 2:15 p.m. Ethics in Taxpayer Representation
Gain a better understanding of the professional and ethical considerations you need to be aware of as a practicing tax attorney in Illinois.

Scott Renfroe
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

2:15 – 3:15 p.m. Taxation of Cryptocurrency
Develop an understanding of the unique tax considerations for cryptocurrencies. We will also review recent guidance from Treasury.

James Creech III
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

3:15 – 3:30 Afternoon Break

3:30 – 4:30 Tax Debt Resolution Boot Camp
A discussion of the various administrative and procedural options available to taxpayers that cannot pay their tax liabilities.

Michael Raff
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com
Additional Information

A. **Financial Contributors (optional):** ☐ 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: ______

B. ☐ (optional) I Request ISBA’s assistance in setting up a pre-program teleconference with all panelists/speakers.

C. **Publications (optional):** To help with program promotion, 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. ______

For marketing, 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
- ☐ Environmental Law
- ☐ Family Law
- ☐ Federal Civil Practice
- ☐ Federal Tax
- ☐ Food Law
- ☐ 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
- ☐ Privacy & Security 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.)
Additional Steps

1. Review the following “CLE Coordinator Checklist” prior to completing your proposal.
2. Distribute the attached “Law ED Presenter Information” to your confirmed speakers. *(also available online at www.isba.org/cle/coordinators)*
3. Attach any additional program agenda information to this completed form in Microsoft Word and send to:

   CLE Department, Attn: Janean Goby  
   Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701  
   e-mail: jgoby@isba.org
Please complete the following template and proposal information, adjusting as necessary.

A. Proposed Program Title *(keep it short, simple and catchy!)* Reverse Mortgages: Origination, Foreclosure Prevention, and the Rights of Heirs

B. Presented by: *(Sponsoring Section(s)/Committee(s))* Consumer Banking, Bankruptcy, and Collection

C. Co-sponsored by: *(optional, but co-sponsoring sections/committees get discounts and broaden marketing base)*

D. Presentation Format - ☐ webcast from the ISBA Chicago Office or ☐ webinar – can be presented from any location with phone and internet; Power Point Presentations are required for webinars

E. Date(s) requested *(Typically a Wednesday or Thursday.)* 6-17-20, 2-3:30 PM
   If Hot Topic Expedited Date Requested, Provide Justification ______

F. Program Times *(Max. 1-2 hours recommended)* 90 mins

1.5 hour(s) MCLE credit, including _____ hour(s) Professional Responsibility MCLE credit in the following category(ies) *(PMCLE not required, but if offered, must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs):*

   • _____ hour(s) Professionalism, Civility, or Legal Ethics MCLE credit (not required)
   • _____ hour(s) Mental Health and Substance Abuse MCLE credit (not required)
   • _____ hour(s) Diversity and Inclusion MCLE credit (not required)

G. Topics Covered: Basics of reverse mortgages, origination, foreclosure prevention options, and the heirs of heirs, including spouses and kids.

H. 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?

   • Learning objective 1Understand mechanics of reverse mortgages
   • Learning objective 2Learn how to cure an alleged default of the mortgage loan
   • Learning objective 3Plan for incapacity or death of mortgagor... (add more as needed)

I. Practice Level Targeted: ☐ Basic  ☑ Intermediate  ☐ Advanced

Program Coordinator(s):
Name, Firm, Address, Telephone Number, E-mail Address
Matthew Hulstein
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com
Program Moderator(s):
Name, Firm, Address, Telephone Number, E-mail Address
Same as above.

Topic 1, 2, 3, etc.
Description (2-3 sentences if not covered in above description) Reverse mortgages can be tricky to understand, even for trained attorneys. Matt Hulstein of CVLS and Michelle Weinberg of Legal Aid Chicago have litigated numerous reverse mortgage foreclosures. They will outline the basics of origination and how the loans work. They will also talk through various ways to avoid foreclosure if the loan is ever in default. Finally, they will outline options for the inevitable death or incapacity of the borrower.

Speaker(s), Firm, Address, Telephone Number, E-mail Address
Matthew Hulstein
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

Michelle Weinberg
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
sample@email.com

☐ Could be a stand-alone practice ready basics program for new attorneys in on-demand CLE catalog

Additional Information

A. ☐ (optional) I Request ISBA’s assistance in setting up a pre-program teleconference with all panelists/speakers.

B. Publications (optional): To help with program promotion, 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.

For marketing, 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
☐ Cannabis
☐ 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
☐ Food Law
☐ General Practice/Solo & Small Firm
☐ Health Care
☐ Human Rights
☐ Insurance Law
☐ Intellectual Property
☐ International & Immigration Law
Additional Steps

Review the following “Checklist for CLE Coordinators” prior to completing your proposal.

1. Distribute the attached “Law ED Presenter Information” to your confirmed speakers. (also available online at www.isba.org/cle/coordinators)

2. Attach any additional program agenda information to this completed form in Microsoft Word and send to:

   CLE Department, Attn: CLE Program Coordinator
   ISBAProgramCoordinator@isba.org
   Illinois State Bar Association, 424 South Second Street, Springfield, IL  62701

   Thank you for your proposal!
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

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

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
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](http://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
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.
<table>
<thead>
<tr>
<th>Section / Committee</th>
<th>Section / Committee CLE Coordinator</th>
<th>CLE Committee Member Liaison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Law</td>
<td>Yolaine Dauphin</td>
<td>Anita DeCarlo</td>
</tr>
<tr>
<td>Agricultural Law</td>
<td>Andrew White</td>
<td>Heather McPherson</td>
</tr>
<tr>
<td>Alternative Dispute Resolution</td>
<td>Sandra Crawford</td>
<td>Kelly Garrett Hicks</td>
</tr>
<tr>
<td>Animal Law</td>
<td></td>
<td>Lisa Nyuli</td>
</tr>
<tr>
<td>Bench &amp; Bar</td>
<td></td>
<td>Tim Storm</td>
</tr>
<tr>
<td>Business &amp; Securities Law</td>
<td>Cory White</td>
<td>Mary Petruchius</td>
</tr>
<tr>
<td>Cannabis Law</td>
<td></td>
<td>Nancy Easum</td>
</tr>
<tr>
<td>Child Law</td>
<td>Missy Greathouse</td>
<td>Pam Kuzniar</td>
</tr>
<tr>
<td></td>
<td>Jennifer Shaw</td>
<td></td>
</tr>
<tr>
<td>Civil Practice &amp; Procedure</td>
<td>Candace Hansford</td>
<td>Tim Storm</td>
</tr>
<tr>
<td>Commercial Banking</td>
<td>Samuel Levine</td>
<td>Paul Osborn</td>
</tr>
<tr>
<td>Construction Law</td>
<td>Adam Whiteman</td>
<td>Kelly Garrett Hicks</td>
</tr>
<tr>
<td>Criminal Justice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education Law</td>
<td>Rob Lyons</td>
<td>Carol Casey</td>
</tr>
<tr>
<td>Elder Law</td>
<td></td>
<td>Heather McPherson</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td></td>
<td>Hon. Martin Siemer</td>
</tr>
<tr>
<td>EUTT</td>
<td>Gerardo Delgado</td>
<td>Ryan Gammelgard</td>
</tr>
<tr>
<td>Environmental Law</td>
<td>Jane McBride</td>
<td>Randy Cox</td>
</tr>
<tr>
<td>Family Law</td>
<td>Pam Kuzniar</td>
<td>Pam Kuzniar</td>
</tr>
<tr>
<td>Federal Civil Practice</td>
<td></td>
<td>Kenneth Matuszewski</td>
</tr>
<tr>
<td>Federal Tax</td>
<td>Patrick Owens</td>
<td>Hon. Carey Gill</td>
</tr>
<tr>
<td>Food Law</td>
<td>Jonathan Carson</td>
<td>Tim Storm</td>
</tr>
<tr>
<td>General Practice</td>
<td>Ebony Huddleston</td>
<td>Kelli Gordon</td>
</tr>
<tr>
<td>Health Care</td>
<td>James &quot;Jim&quot; Engelman</td>
<td>John Johnston</td>
</tr>
<tr>
<td>Human Rights</td>
<td>TBD - Glenn for now</td>
<td>Mary Petruchius</td>
</tr>
<tr>
<td>Insurance Law</td>
<td>Renita Ward</td>
<td>Ryan Gammelgard</td>
</tr>
<tr>
<td>Intellectual Property</td>
<td>Jonathan LA Phillips</td>
<td>Kenneth Matuszewski</td>
</tr>
<tr>
<td>International &amp; Immigration</td>
<td></td>
<td>Jean Wenger</td>
</tr>
<tr>
<td>Labor &amp; Employment</td>
<td></td>
<td>Hon. Martin Siemer</td>
</tr>
<tr>
<td>Local Government</td>
<td></td>
<td>Eric Evans</td>
</tr>
<tr>
<td>Mental Health Law</td>
<td>Barbara Goeben</td>
<td>Carol Casey</td>
</tr>
<tr>
<td>Mineral Law</td>
<td>Laura Harmon</td>
<td>Kelli Gordon</td>
</tr>
<tr>
<td>Privacy &amp; Information Security Law</td>
<td></td>
<td>Tim Storm</td>
</tr>
<tr>
<td>Real Estate</td>
<td>Emily Vivian</td>
<td>Hon. Carey Gill</td>
</tr>
<tr>
<td>Senior Lawyers</td>
<td>Eugenia Hunter</td>
<td>Paul Osborn</td>
</tr>
<tr>
<td>State &amp; Local Tax</td>
<td>Gary Smith</td>
<td>Paul Osborn</td>
</tr>
<tr>
<td></td>
<td>David Kupiec</td>
<td></td>
</tr>
<tr>
<td>Tort Law</td>
<td></td>
<td>Anita DeCarlo</td>
</tr>
<tr>
<td>Traffic Laws &amp; Courts</td>
<td>Brick Van Der Snick</td>
<td>Randy Cox</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trusts &amp; Estates</td>
<td>William (Bill) Kuehn</td>
<td>Heather McPherson</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workers’ Compensation</td>
<td></td>
<td>Anita DeCarlo</td>
</tr>
<tr>
<td>Young Lawyers</td>
<td></td>
<td>Kenneth Matuszewski</td>
</tr>
<tr>
<td>ARDC</td>
<td></td>
<td>Roy Dent</td>
</tr>
<tr>
<td>Corrections &amp; Sentencing</td>
<td>Donald Ramsell</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kristine Honiotes</td>
<td></td>
</tr>
<tr>
<td>Delivery of Legal Services</td>
<td></td>
<td>Mary Petruchius</td>
</tr>
<tr>
<td>Disability Law</td>
<td>Barbara Goeben</td>
<td>Lisa Nyuli</td>
</tr>
<tr>
<td>Government Lawyers</td>
<td></td>
<td>Carol Casey</td>
</tr>
<tr>
<td>LOME</td>
<td>John Olmstead</td>
<td>Nancy Easum</td>
</tr>
<tr>
<td>Legal Technology</td>
<td>Aaron Brooks</td>
<td>Randy Cox</td>
</tr>
<tr>
<td>Military Affairs</td>
<td></td>
<td>Kelli Gordon</td>
</tr>
<tr>
<td>REM</td>
<td>Sharon Eiseman</td>
<td>Pam Kuzniar</td>
</tr>
<tr>
<td>SOGI</td>
<td>Jennifer Shaw</td>
<td>Annemarie Kill</td>
</tr>
<tr>
<td>Women and the Law</td>
<td>Dina Ninfo</td>
<td>Annemarie Kill</td>
</tr>
<tr>
<td></td>
<td>M. Colleen Kilbridge</td>
<td></td>
</tr>
</tbody>
</table>
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
Memorandum

To: ISBA Section and Committee Chairs and CLE Coordinators

From: ISBA CLE Committee and Staff

Date: June 2020

Re: FY 19-20 CLE REPORT

To assist your section in providing relevant, timely and fully-developed CLE programs, both live onsite and in the ISBA On-Demand 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 2012

2. CLE Hours Requested To Be Produced for FY 19-20 and FY 20-21

3. Number of Active Dues Paying Section Members

4. Program Evaluation Summary for FY19-20 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 2019- May 2020
   d. 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 On-demand CLE catalog because it is either still in production, had technical problems in recording, or had low evaluation scores.
Overview of ISBA CLE Process with CLE Staff
The Journey of Live On-site Program
From Proposal through Posting in On-Demand Catalog
(over 70 live onsite/year and over 50 webcasts/webinars/year)

Key:
CE- Copywriter Editor (Staci)
PC- Program Coordinator (Tara)
RC- Registration Coordinator (Jacquie)
AA- Administrative Assistant (Ashley)
CAT– Production and Catalog Assistant (Justine)
VP – Video Producer (Drew)

Program Proposal
(5 – 6 Months Prior to Program)

Review and Approval (w/in 4 weeks)

Work with coordinator on missing info
(w/in 4 weeks)

Add approved title to all 4 ISBA calendars

PC books venue, videographer, staffers
(w/in 4 weeks)

PC schedules faculty call if requested
Editorial and Marketing Process
(0 – 4 months Prior to Program)

CE drafts working copy of brochure working with coordinator
(2-4 months prior)

CE works with graphics, membership & mail room on mailer (goal to mail 8 wks prior)

CE works with marketing dept. on emails, eclips feature, and social media
(limited to 2 emails per week)

Production and Online Registration Process
(2-3 months Prior to Program)

CAT – when agenda final, open reg in Blue Sky LMS (5 webpages) update as changes come in

CAT – enter course in MCLE Board PCAM, adding PMCLE app when materials come in
Speaker/Moderator Contacts
(5 months prior to Program)

PC and CAT create Excel speaker merge with contact info for all communications and thank yous.

PC sends speaker packet when agenda is final (2 – 4 months prior)

PC – work with financial contributors, if any

Preparing for the Program
(2 wks prior to program date)

CAT – compile materials into coursebook PDF – post on ISBA website and in Blue Sky LMS

PC and CAT – compile program packet and mail to Chicago office (3-5 days Prior)

Program

RC staffs most off-site programs
RC provides customer service for calls on registrations, credit tracking, technology issues, etc.

**After Program**
(Immediately – 4 months after)

- PC and RC enter faculty credit into ISBA database and MCLE Board PCAM and generate certificates
- RC adds walk-in registrants and enters and adjusts attendee MCLE credit in Blue Sky LMS
- VP edits video into segments and full programs, inserting openers, closers, title pages, etc. (0-2 months after, depending on volume)
- AA applies for credit in MCLE Board PCAM and activates in on-demand catalog when approved
- AA repeats above for all courses with accreditation extension requests from sections.
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.
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

<table>
<thead>
<tr>
<th>Substance</th>
<th>Materials</th>
<th>Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
<tr>
<td>Title</td>
<td>Speaker</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

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     □ Southern IL
□ Northern IL    □ Collar Co.
□ Chicago        □ Other (please list)

Number of attorneys in firm/office:

□ solo         □ 11-20
□ 2-5          □ 21-40
□ 6-10         □ over 40
□ Cook
□ Other (please list)
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.
Hello ISBA Faculty,

Thank you for agreeing to present or moderate at the ISBA Law Ed Program entitled *Family Law: Addressing and Adapting to Today’s Financial Uncertainty* scheduled to be held on 6/25/2020 from 12:00pm-2:00pm via Webcast. Additional information related to technology requirements to follow.

We ask that you complete and return the items identified below via email to the ISBA CLE Program Coordinator at speakerinfo@isba.org by Thursday, June 18, 2020:

- **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.

- **Presentation Agreement** – Please complete and sign the attached presentation agreement. 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.

  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, and
- Faculty resources

We encourage you to review ISBA’s faculty training videos and resources online at [www.isba.org/cle/faculty](http://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 *Family Law: Addressing and Adapting to Today’s Financial Uncertainty* 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,

**Tara Sanders | CLE Program Coordinator**  
Illinois State Bar Association  
800.252.8908 Ext. 1421  
tsandars@isba.org  
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. If you have any additional equipment requests please contact Tara Sanders at tsanders@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 $200, 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:

<table>
<thead>
<tr>
<th>Short Videos</th>
<th>PDF Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engaging Your Audience</td>
<td>Material Guidelines</td>
</tr>
<tr>
<td>Using PowerPoint Effectively</td>
<td>Using PowerPoint to Present your Lecture</td>
</tr>
<tr>
<td>Making Your Voice Come Alive</td>
<td>Interactive Teaching Methods</td>
</tr>
<tr>
<td>Using Webinar Engagement Tools Effectively</td>
<td>On-Camera Presenter Tips</td>
</tr>
<tr>
<td></td>
<td>PMCLE Presenter Tips</td>
</tr>
</tbody>
</table>
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.

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.

**Audit:** The Illinois Supreme Court Commission of Professionalism may audit this program to ensure compliance with Professional Responsibility course credit.

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

I would like to personally invite you to attend ISBA’s upcoming live webcast titled, “Family Law: Addressing and Adapting to Today’s Financial Uncertainty,” which I will be co-presenting via the Internet on Thursday, June 25, 2020.

The pandemic has impacted the economy which effects the way we practice family law. Don’t miss this online seminar that provides you with an outline of the issues you may face and the creative solutions for moving your cases to closure. Family law attorneys and business advice practitioners with all levels of practice experience who attend this program will better understand: what the past has taught us about economic downturns; how to handle business valuations that were completed at the end of 2019; considerations for current and future business valuations, including reopening Illinois, the equitable valuation date, changes to the typical methodology used by valuation experts, and industry analyses; the creative settlement structures at your disposal; government stimulus plans; income determinations and lifestyle evaluations going forward; how to handle bankruptcies; and much more. The seminar is presented by the ISBA Family Law Section. It qualifies for 2.0 hours MCLE credit.

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, June 25, 2020
12:00 – 2:00 P.M.
Live Webcast
Register Here.
$60/Members; $100/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, 2020.

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.
(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.
Short Faculty Development Videos

The Top Tips to Deliver a Fantastic Virtual Presentation

Steve Hughes provides tips for delivering an effective virtual presentation during the COVID-19 pandemic.

Engaging Your Audience

Steve Hughes talks about how to engage your audience to improve learning.

Making Your Voice Come Alive

Ever wonder what it takes to sound great on a webinar? Steve Hughes gives suggestions for how to make your voice come alive.

Using Power Point Effectively

Steve Hughes shows you how to make slides that are user-friendly.

Using Webinar Engagement Tools Effectively

Steve Hughes explains how to make webinars that aren’t boring by using engagement tools effectively.

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

Broadcast journalist pro Bill Moller helps you prepare for your next CLE studio presentation or on-camera courtroom appearance with his prize-worthy tips – from preparing your notes and organizing your presentation, to presenting your information on-camera with energy, comfort and ease!
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 demonstrate 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.)

   (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 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.)
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.


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

All original materials should be:

2. 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!

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.

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.
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:
  o Presentation headers should be 32-point font or larger.
  o The body of your slide should be no less than 24-point font.
  o 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.
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
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 4 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.

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!
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 ensure 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
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
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