



CLE Coordinator Handbook for Program Planning

July 2025

The Triple Crown of CLE



ISBA CLE Mission: ISBA Law Ed will provide the best CLE to enhance professionalism and to promote the successful practice of ISBA members.

TABLE OF CONTENTS

CLE COORDINATOR ROLE AND EXPECTATIONS

CLE Coordinator Role and Benefits	3
Programming Expectations	4
2025-2026 Proposal Deadlines	5

ISBA'S CLE COORDINATOR RESOURCES FOR PLANNING

ISBA Webpage for CLE Coordinators (www.isba.org/cle/coordinators)	9
Top 50 On-Demand Programs	10
On-Demand Catalog Topic Review	12
Accreditation Extension Request Form (www.isba.org/cle/coordinators/extendcredit)	14
Faculty Recruitment – Speakers with Disabilities and New Speakers	15
Section Member CLE Survey Template	16
Table Clinic Options and Templates	18
Planning Panel Presentations	21
Developing and Incorporating Polling Questions	22
ISBA Guidelines for Future Live Onsite CLE	23
Webcast Presentation Proposal Form	25
Live On-site Program Proposal Form	30
Sample Program Agenda Submitted with Program Proposal	35

ISBA CLE COMMITTEE AND STAFF SUPPORT

List of CLE Coordinators and CLE Committee Liaisons	38
Role of CLE Liaison	44
CLE Program Flow Chart	45
Sample Evaluation Form	49
Sample Speaker Packet	
Email to Speakers	51
General Information	53
Prepare for your ISBA Recording	55
Presentation Agreement	56
Sample Speaker Program Promotion Email	
Email to Speakers	58
Sample Speaker Invitation	60
Law Ed Faculty Resources (www.isba.org/cle/faculty)	
Video Resources	61
Materials Guidelines	62
Options for Interactivity	66
Miscellaneous Law Ed Policies	
Pricing	67
Destination CLE	69
Financial Contributor/Subsidized CLE	74

ISBA CLE Coordinator – Volunteer Position Description

Summary of Responsibilities

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

Primary Responsibilities

- At the beginning of the bar year:
 - Review the Annual CLE Committee report with the CLE Committee liaison which includes the section or committee's CLE history, master CLE curriculum calendar with upcoming assigned dates, past program evaluations and more
 - Take an ISBA Online CLE program to understand the experience of our members, since almost all ISBA CLE hours are delivered online
 - Review all ISBA Online CLE content for your subject area and expirations dates (2 years after presented) to identify deficits and plan programming to fill those deficits
 - Identify any of your section or committee Online CLE programs with accreditation expirations dates that should be extended because the content is still current and beneficial for viewing and request an accreditation extension via the form at www.isba.org/cle/coordinators
- Plan and formally propose the number of CLE programs requested by the CLE committee for the section or committee you represent, including the requested number of webcasts or webinars
- Submit proposals by the CLE deadlines occurring during the bar year for which you are appointed
- Work closely with the section council or committee you represent to select 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.



2025-2026 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 FY25-26 term, please plan programs that will occur between October of 2025 and November of 2026. The online proposal webform is available at <http://www.isba.org/cle/coordinators>.

Live Onsite Programs

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

Webcast or Webinar Presentations

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



Section & Committee Annual CLE Programming Expectations – FY 2025-26 **Requested Minimum Number of CLE Hours to be Produced for On-Demand Catalog**

Sections

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

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

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

Section	Requested Hours of CLE Content to Produce for On-Demand Catalog	“PRACTICE READY” BASICS CLE INITIATIVE <i>The hours below will count toward your requested hours of CLE content.</i>
		Please include:
Administrative Law	2	1 hour basics
Agricultural Law	5	1 hour basics
Alternative Dispute Resolution	2	1 hour basics
Animal Law	2	1 hour basics
Bench and Bar	5	1 hour basics
Business Advice, Collections, & Financial Planning	5	1 hour basics
Business & Securities Law	5	1 hour basics
Cannabis Law	5	1 hour basics
Child Law	2	1 hour basics

Section	Requested Hours for On-Demand Catalog	“PRACTICE READY” BASICS CLE INITIATIVE Please include:
Civil Practice & Procedure	20	3 hours basics
Commercial Banking, Collections, & Bankruptcy	5	2 hours basics
Construction Law	2	1 hour basics
Corporate Law Departments	5	1 hour basics
Criminal Justice	10	2 hours basics
Education Law	2	1 hour basics
Elder Law	5	1 hour basics
Employee Benefits	2	1 hour basics
Energy Utilities Trans & Tele	2	1 hour basics
Environmental Law	2	1 hour basics
Family Law	20	3 hours basics
Federal Civil Practice	5	1 hour basics
Federal Taxation	5	1 hour basics
Food Law	2	1 hour basics
General Practice, Solo/Small Firm	5	1 hour basics
Health Care	5	1 hour basics
Human Rights	2	1 hour basics
Insurance Law	5	1 hour basics
Intellectual Property	5	1 hour basics
International & Immigration Law	2	1 hour basics
Labor & Employment Law	10	2 hours basics
Local Government Law	5	1 hour basics
Mineral Law	2	1 hour basics
Privacy & Information Security Law	2	1 hour basics
Real Estate	20	3 hours basics
Senior Lawyers	2	1 hour basics
State & Local Taxation	5	1 hour basics
Tort Law	10	2 hours basics
Traffic Laws & Courts	10	2 hours basics
Trusts & Estates	20	3 hours basics
Workers’ Compensation	10	1 hour basics
Young Lawyers Division	20	3 hours basics

Committees

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

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

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

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

ISBA WEBPAGE FOR CLE COORDINATORS (www.isba.org/cle/coordinators)



The screenshot shows the ISBA website for CLE coordinators. The header features the ISBA logo and navigation links: About ISBA, Contact Us, For the Public, Member Login, and Join Now. A secondary navigation bar includes News & Publications, CLE & Events, Practice & Career, Groups & Participation, and Membership & Benefits. The main content area has a large banner with the text "CLE Coordinators" over a background image of people. Below the banner, a message thanks coordinators for their service and mentions the program planning process. A section titled "Coordinator Training" states that ISBA provides quarterly training sessions, which are recorded for those who cannot attend live. It encourages coordinators to take advantage of these opportunities and contact the Program Coordinator for more information. A link for the "July 2024 CLE Coordinator Training Session Recording" is provided. On the right side, a sidebar titled "What do you want to do?" contains a search bar and a list of links: CLE & Events, Upcoming CLE, On-Demand CLE, Free On-Demand CLE, FAQs, and My CLE Account.

https://www.isba.org/cle/coordinators

 **ILLINOIS STATE
BAR ASSOCIATION®**

About ISBA Contact Us For the Public Member Login Join Now

News & Publications ▾ CLE & Events ▾ Practice & Career ▾ Groups & Participation ▾ Membership & Benefits ▾

CLE Coordinators

Thank you for serving as a CLE coordinator for your ISBA Section or Committee. The ISBA appreciates your efforts and wants to make your program planning process as easy and enjoyable as possible.

Coordinator Training

ISBA provides CLE Coordinator training sessions quarterly. Sessions are recorded for those who cannot attend the live meeting.

You are encouraged to take advantage of these training opportunities. Please contact the [Program Coordinator](#) of the ISBA CLE Department for information on upcoming live training sessions.

- [July 2024 CLE Coordinator Training Session Recording](#)

What do you want to do?

Search CLE

- ^ CLE & Events
- Upcoming CLE
- On-Demand CLE
- Free On-Demand CLE
- FAQs
- My CLE Account



Top 50 Online CLE Programs July 1, 2024 – June 30, 2025

(ranked by total numbers of orders)

1. 2025: New Year, New Laws
2. 60 Artificial Intelligence Tips in 60 Minutes
3. Basic Skills - ISBA's Program for Newly Admitted Attorneys
4. Achieving Wellness, Work-Life Balance, and Long-Term Success in Your Law Practice
5. 1973 - 2022: The Dobbs Decision
6. Applying Artificial Intelligence Tools in Your Practice
7. Mental Health 101: Strategies for Thriving, Not Just Surviving
8. ISBA's 6 Hour Professional Responsibility MCLE Bundle
9. 2025 Professionalism Bundle
10. Artificial Intelligence and the Effects on Minorities
11. Artificial Intelligence for Lawyers: What You Need to Know So You Aren't Left In the Dust
12. Civil Practice Update 2024 - Part 1
13. 15 Hour Solo & Small Firm Bundle - 2024
14. 10 Tips for Illinois Attorneys: Artificial Intelligence and Blockchain in Real Estate
15. 60 Technology Tips in 60 Minutes
16. Defending a Demon: How Representing John Wayne Gacy Impacted One Woman's Legal Career
17. Implicit/Unconscious Bias
18. 2024 Traffic Case Law and Legislative Update
19. Eight Things Every Trial Lawyer Should Know
20. 8 Things Killing Your Law Firm and How to Stop Them
21. Estate Planning Basics
22. Due Diligence in Commercial and Residential Real Estate Matters
23. Like the Law, Happiness is a Practice
24. 6th Annual Abraham Lincoln's Legal Legacy: Lessons for Today's Lawyers - Democracy, The Constitution, and Lincoln the Lawyer/President - Part 1
25. (D)emystifying a (P)rivacy (A)cronym: Data Protection Addendum (DPA) 101
26. Civil Practice Basics Series - Part 3: Taking and Defending Depositions

27. 2024 Federal Tax Update
28. 1908 Springfield Race Riot
29. How to Fight and Beat Procrastination
30. Pronouns On Trial
31. "Boilerplate" Provisions in Contracts: Overlooked Traps in Every Agreement - A National Perspective
32. Diversity, Equity, and Inclusion in the Legal Profession: What We Are, Where We Need to Be, and Ways to Get There
33. Practical Tips for Trial and Beyond
34. Civil Practice Basics Series - Part 2: Affirmative Defenses in Illinois
35. Civil Practice Basics Series - Part 1: Drafting the Complaint
36. Operation Greylord Revisited: Lessons Learned from an Insider's Perspective
37. Artificial Intelligence in Personal Injury Law
38. The Dawning of the Age of Artificial Intelligence: Promise or Threat to the Practice of Law?
39. Probate Pitfalls
40. Civil Practice Update 2024 - Part 2
41. All In on Artificial Intelligence: Microsoft's Brave New World
42. Seeing Red: Transforming Anger into Healthy Skills for Healthy Living
43. ADHD: A Rise in Diagnosis of Women, Its Impact on the Legal Profession, and How It Affects the Professional Woman
44. 7 Things Lawyers Never Do (But Should)
45. 5th Annual Abraham Lincoln's Legal Legacy: Lessons for Today's Lawyers - Science and Technology's Rapidly Evolving Impact on the Law - Part 1
46. Civil Practice Basics Series - Part 4: Motion Practice
47. Practicing Practical Probate - Part 1: Probing the Probate Process
48. The Basics (and Not So Basics) of Transfer on Death Instruments: Estate Planning with TODs
49. Artificial Intelligence (AI) and the Courts - An Overview
50. Artificial Intelligence: The Ethical Headwinds

ON DEMAND CATALOG TOPIC REVIEW

Ways to Identify

Current Online CLE Content for an ISBA Section or Committee

OPTION 1:

1. Go to www.isba.org/cle/coordinators and select the link to “current Online CLE programs”:
2. Select your group from the list of sections and committees at 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.



Committees

- Attorney Registration and Disciplinary Commission
- Delivery of Legal Services
- Disability Law
- Racial and Ethnic Minorities and the Law
- Sexual Orientation and Gender Identity
- Women and the Law

Sections

- Administrative Law
- Agricultural Law
- Alternative Dispute Resolution
- Animal Law
- Federal Taxation
- General Practice, Solo, and Small Firm
- Health Care Law
- Human Rights

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



Filter Programs By:

Title:

Topic: Practice Ready Basics 

PMCLE: - Any -
Professional Responsibility MCLE Credit (PMCLE included in general MCLE credit)

☐ Closed Captioned 

Trending Topics

[Law Office Management](#)

[Legal Technology](#)

[New Lawyers](#)

[Basic Skills for New Attorneys](#)

[On-Camera Speaker Tips](#)

ISBA Members: All programs listed below are eligible for Free CLE

Eligibility to earn MCLE credit for recorded programming expires two years from the program date unless otherwise noted; you must view and certify credit within this period. The date you certify completion is the date recorded for earning your MCLE credit. Note, you may not claim credit for attending/completing the same course twice within a 12 month period.

Course 	MCLE	PMCLE
Business Considerations in Structure and Managing an Estate Planning Practice - Practice Ready Series	0.50	
Cannabis 101: Advising Your Illinois Clients on the Cannabis Industry	1.00	
E-Filing: How to File Properly While Meeting Privacy Obligations 	1.00	 1.00
Eliciting What You Need to Know from Your Client - Practice Ready Series	0.50	

REQUEST TO EXTEND ON-DEMAND CLE PROGRAM ACCREDITATION PERIOD

Program Title •

Sponsoring Section or Committee •

CLE Coordinator Making the Request •

Christine Self

CLE Coordinator's Email •

cself@isba.org

Expiration Date (if currently listed in **ISBA on-demand catalog**)

Typically two years from original recording date.

Month	▼
Day	▼
Year	▼



New Expiration Date Requested

☐ 1 year

☐ 2 years

☐ Other

Submit

ISBA LAW ED FACULTY Join Us!



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

WE MAKE IT EASY TO GET INVOLVED!

Get started with any of the following options:

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

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

SECTION MEMBER CLE SURVEY – TEMPLATE

*To Send to all Section Members, not just Section Council Members
(Survey can be adapted to the specific substantive law area)*

This survey is sent by the ISBA's _____ Section Council to get input on your preferred ISBA CLE program topics and formats, so the ISBA _____ Section Council can plan and present programming for the On-Demand Electronic CLE catalog to best meet your needs and interests.

1. What format of ISBA CLE have you attended or participated in: (Select all that apply)
 - a. On-Demand CLE (this is pre-recorded electronic CLE including the 15 hours of Free On-Demand CLE each bar year for ISBA members)
 - b. Live Webcasts (electronic CLE viewed live online as it is presented)
 - c. Live On-Site CLE (pre-pandemic)
 - d. None (skip to question 4)
2. What did you like about ISBA's CLE you attended or participated in? _____
3. If you have taken an ISBA On-Demand CLE program, how satisfied were you with the topic choices available in the _____ substantive law area?
 - a. Very Satisfied
 - b. Satisfied
 - c. Neither satisfied nor dissatisfied
 - d. Dissatisfied
 - e. Very dissatisfied
4. What content is missing from the ISBA [On-Demand CLE catalog](#) on _____ (section's area of law) that you would take from ISBA if it was available? (please be specific) _____
5. What can ISBA do to enhance your member benefit of 15 hours of Free On-Demand CLE per bar year? _____
6. If given the option, how would you prefer to participate in future ISBA _____ Section CLE programs?
 - a. Live onsite
 - b. Live webcasts viewed online at the time they are presented
 - c. On-Demand CLE, pre-recorded and available anytime 24/7
 - d. Other _____
7. Other _____ (section) CLE comments or suggestions? _____
8. What best describes the nature of your current job function?
 - a. lawyer: in private practice

- b. lawyer: in government service
- c. lawyer: for a non-profit organization (including legal services)
- d. in-house counsel
- e. Judge
- f. law student
- g. not currently employed
- h. retired
- i. other (*please specify*):

9. If you work in a law firm, how many lawyers (including yourself) are currently employed by your law firm?

- a. 1 (just you)
- b. 2 - 5
- c. 6 - 9
- d. 10 - 24
- e. 25 - 49
- f. 50 - 99
- g. 100 or more
- h. I do not work in a law firm

10. I have practiced law:

- a. Under 3 years
- b. 3-5 years
- c. 6 – 15 years
- d. Over 15 years
- e. I am not practicing
- f. Other _____

TABLE CLINIC OPTIONS AND BENEFITS

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.

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

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 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. The presenters will know what the attendees need to know, or what confuses the attendees to address the same in the comprehensive how- to-video.

SAMPLE TABLE CLINIC AGENDA

_____ **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 provides 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

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

- **Topic Three – Room C**

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

- **Topic Four – if a big crowd is expected – Room D**

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

30 Minutes - Lunch (provided)

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

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

- **Topic One - Room A**

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

- **Topic Two – Room B**

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

- **Topic Three – Room C**

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

- **Topic Four – if a big crowd is expected – Room D**

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

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

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

Panel Planning Sheet to be used with “Dynamic CLE Panel Sessions” by David Cruickshank of Edge International.

You may use this template with acknowledgement of
David.Cruickshank@edgeinternational.com

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.

ISBA GUIDELINES FOR FUTURE LIVE ONSITE CLE

As a result of the success of ISBA's all-virtual CLE programming during the pandemic and the stated preference of over 85% of ISBA members for online CLE in the form of live webcasts and on-demand programs (*determined by ISBA Law Ed surveys and CLE analytics*), the emphasis of ISBA CLE will be on live webcasts as the preferred presentation format to capture content for the ISBA on-demand CLE catalog.

However, if a section or committee desires to present a program in the live onsite format, they may submit a proposal that will be evaluated on whether the program provides attendees a unique experience, unlike the typical webcast CLE experience. Live onsite programs will be held at the ISBA's Chicago office, which can host up to 68 attendees. Other venues will be considered only if there is ***no venue cost to ISBA***.

ISBA live onsite CLE will be allowed only in accordance with applicable public health guidelines and at such times as the ISBA believes it is safe for members and staff to congregate. ISBA retains the sole discretion to cancel a live onsite program or change the format to a webcast or recording. The health and safety of ISBA members and staff are of paramount concern and priority.

A. Justification: Proposals for live onsite CLE should present justification for the live onsite format. Factors that will be considered include, but are not limited to any of the following:

1. Networking is offered.
2. Interactivity is included (*e.g.*, table clinics, polling, breakout sessions, etc.).
3. New attorneys in their first 5 years of practice (*i.e.*, who can attend for free) will be matched with a mentor for the day.
4. At least one new attorney speaker and/or one diverse speaker is included in the faculty. Include consideration of diversity, equity and inclusion in speaker selection
5. A luncheon or reception is provided by a sponsor to be identified by the group submitting the proposal.
6. In venues other than the CRO, each panel must be available to record their topic for inclusion in the on-demand catalog.

B. Eligibility: If the justification above is provided and deemed to have been met as determined by the Director of CLE in consultation with the ISBA CLE Committee, the following programs are eligible for live onsite CLE, if health and safety concerns are not an issue.

1. Minimum of 3 hours of CLE presentation time
2. Joint ISBA Section/Committee CLE Programs:
 - a. Co-sponsored live onsite CLE programs.
 - b. Concurrent CLE events by multiple sections/committees.

3. One program annually by each of the six ISBA Sections with the largest section-dues-paying membership because of the greater pool of potential live onsite attendees. Attendance of 50 or more will qualify these programs to repeat in subsequent years. Based on 2024-25 numbers, the qualifying sections are:
 - a. Trusts and Estates (2,497 members)
 - b. Real Estate (2,162 members)
 - c. Family Law (1,828 members)
 - d. Civil Practice (1,811 members)
 - e. Tort Law (1,253 members)
 - f. Criminal Justice (1,121 members)
4. Historically successful live onsite CLE programs. Attendance of 50 or more will qualify a live onsite program to be repeated in subsequent years. Current qualifying programs include:
 - a. Agricultural Law
 - b. Environmental Law
 - c. Annual Abraham Lincoln's Legacy CLE
 - d. Bench & Bar Civility CLE
5. CLE programs at ISBA Annual and Midyear Meetings.
6. Skills programs: Trial Techniques and 40 Hour Mediation.
7. Select Master Series programs.
8. Other programs may be eligible, if rationale is presented and approved by the Director of CLE in consultation with the CLE Committee.

C. Guidelines for Sponsorship:

1. Programs may be required to include sponsorship to reduce program expenses
2. Sponsors may be offered recognition in promotional materials

D. Destination Programs

1. Destination CLE programs, with a maximum of one per bar year for ISBA, if proposed and approved one year in advance, in accordance with ISBA's policy.

Webcast Presentation Proposal Form

Please fill out the form below. After your proposal has been reviewed, we will contact you with further information.

No onsite audiences.

Contact Information

Name *

Telephone Number *

E-mail Address *

Your Proposal

Proposed Program Title *

Keep it short, simple and catchy!

Presented by *

Sponsoring Section(s)/Committee(s)

Co-presented by

Optional, but co-presenting sections/committees get discounts and broaden marketing base.

Are the co-presenters confirmed?

- ☐ Yes
- ☐ No

Date(s) requested *

Typically a Wednesday or Thursday; confirm availability with ISBA staff prior to any other planning

Is this a Hot Topic expedited date request? *

- ☐ Yes
- ☐ No

Program Times *

Max. 1-2 hours recommended

Estimated MCLE credit hours *

Will this program offer PMCLE Credit *

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.

- ☐ Yes
- ☐ No

Practice Level Targeted *

- ☐ Basic
- ☐ Intermediate
- ☐ Advanced

Program Coordinator(s) *

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

Program Moderator(s) *

Introduces speakers, poses questions or comments to speakers. Name, Firm, Address, Telephone Number, E-mail Address

Program Chat Moderator(s)

Someone well versed in the legal topic, to monitor and engage the remote audience in chat discussions. Name, Firm, Address, Telephone Number, E-mail Address

Topics Covered

Please fill out as many topics as needed.

Topic 1

Topic 1 Title *

Topic 1 Description *

Topic 1 Duration *

(e.g. 30 minutes)

Topic 1 Speaker(s) and Contact Information *

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

Do you have a second topic? *

☐ Yes

☐ No

Additional Information**Would you like ISBA's assistance in setting up a pre-program teleconference with all panelists/speakers? ***

☐ Yes

☐ No

Publications *

Authors who are interested in converting their CLE presentation into an Illinois Bar Journal or ISBA section newsletter article, or Illinois Lawyer Now blog, may be contacted by ISBA staff with details about submission options.

☐ Yes

☐ No

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

To select multiple items, hold down the control key (Apple key on a Mac) while selecting. You can also deselect by holding down the control key and clicking on a selected item.

Sections

Administrative Law

Agricultural Law

Alternative Dispute Resolution

Submit Proposal

Live Onsite CLE Program Proposal Form

Please fill out the form below. After your proposal has been reviewed, we will contact you with further information.

Default location for all live onsite programming is ISBA's Chicago office. Simultaneous live webcasts will only be considered at that location.

Contact Information

Name *

Telephone Number *

E-mail Address *

Your Proposal

Proposed Program Title *

Keep it short, simple and catchy!

Presented by *

Sponsoring Section(s)/Committee(s)

Co-presented by

Optional, but co-presenting sections/committees get discounts and broaden marketing base.

Are the co-presenters confirmed?

☐ Yes

☐ No

Location - City/Venue

(ISBA's Chicago Office is the default venue; all requests for a different venue must be approved by the CLE Committee)

Date(s) requested *

Confirm availability with ISBA staff prior to any other planning

Program Times *

Minimum of 3.5 hours MCLE for live onsite audience. Shorter programs will be done as webcasts. Indicate hours, full, or half-day

Estimated MCLE credit hours *

Will this program offer PMCLE Credit *

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.

☐ Yes

☐ No

Practice Level Targeted *

☐ Basic

☐ Intermediate

☐ Advanced

Will all speakers present live onsite? *

To ensure the best experience for attendees and to minimize technology risks all speakers should present live onsite. Note, remote speakers will only be allowed by pre-recorded video in special circumstances as approved by the CLE committee.

☐ Yes

☐ No

Justification for Live Onsite Program *

☐ Networking

☐ Interactivity such as table clinics, etc.(please specify)_____

☐ Networking luncheon or reception (sponsorship to assist with costs may be required)

☐ New attorney Speaker(s) in first 8 years of practice

☐ Diverse Speaker(s)

☐ Co-sponsorship with other ISBA sections

☐ Historical Success (annual event, 50 or more live onsite attendees historically, etc.)

☐ Other

Program Coordinator(s) *

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

Program Moderator(s) *

Introduces speakers, poses questions or comments to speakers. Name, Firm, Address, Telephone Number, E-mail Address

Topics Covered

This form allows four topics. If you have more than four topics or are requesting breakout sessions, please email your draft agenda to ISBAProgramCoordinator@isba.org. Please be sure to include the name of your program and the date that you submitted your proposal form when emailing your draft agenda.

Topic 1

Topic 1 Title

Topic 1 Description

Topic 1 Duration

(e.g. 30 minutes)

Topic 1 Speaker(s) and Contact Information

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

Do you have a second topic?

- ☐ Yes
☐ No

Additional Information

Are Financial Contributors Secured? *

I have secured financial contributors for this program and have reviewed and followed the guidelines of ISBA's Financial Contributor Policy.

- ☐ Yes
- ☐ No

Would you like ISBA's assistance in setting up a pre-program teleconference with all panelists/speakers? *

- ☐ Yes
- ☐ No

Publications *

Authors who are interested in converting their CLE presentation into an Illinois Bar Journal or ISBA section newsletter article, or Illinois Lawyer Now blog, may be contacted by ISBA staff with details about submission options.

- ☐ Yes
- ☐ No

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

To select multiple items, hold down the control key (Apple key on a Mac) while selecting. You can also deselect by holding down the control key and clicking on a selected item.

Sections

Administrative Law

Agricultural Law

Alternative Dispute Resolution

Submit Proposal

SAMPLE PROGRAM AGENDA SUBMITTED WITH PROGRAM PROPOSAL

Real Estate Law Update 2025

Presented by the ISBA Real Estate Law Section

Live Program

ISBA Chicago Office

October 29, 2025

8:55 a.m. – 4:30 p.m.

Join us for this full day seminar that will examine recent case law updates and legislative changes from the past year. Learn more about recovering attorney's fees in real estate litigation, discuss what you need to know about the Northwest Ordinance, and expand your knowledge of how to troubleshoot landlord-tenant issues. You'll also increase your knowledge regarding what all real estate practitioners need to know about probate, how to clear title exceptions, and handling environmental issues. New attorneys, experienced attorneys, and non-real estate practitioners will benefit from these updates and best practice tips.

Program Coordinator & Moderator:

Cheryl A. Morrison, Law Office of Cheryl A. Morrison, Mokena, IL

8:55 – 9:00 Welcome

Cheryl A. Morrison, Law Office of Cheryl A. Morrison, Mokena, IL

9:00 – 9:45 Case Law Update

Get up to date on the most recent case law affecting real estate, as well as best practice tips and advice from our speakers.

Emily R. Vivian, Ehrmann Gehlbach Badger & Considine, LLC, Dixon, IL

Heather Glockler, Castle Law, Joliet, IL

9:45 – 10:15 Legislative Update

Learn about real estate related legislation that has passed during the 2024-25 session.

Bruno Tabis, Huck Bouma, PC, Wheaton, IL

10:15 - 10:30 Break (beverages provided)

10:30 – 11:15 Recovering Attorneys' Fees in Real Estate Litigation

Join us for a review of various statutes from the mechanic's lien act to the deceptive business practices act and more to learn when and how attorney's fees are recoverable.

Samuel H. Levine, Of Counsel, Downey & Lenkov LLC, Chicago, IL

Frank M. Swanson, Bryce Downey & Lenkov LLC, Chicago, IL

11:15 – 12:00 – Northwest Ordinance

Review of the City of Chicago Northwest Side Preservation Ordinance that grants a right of first refusal to residential tenants when selling a property. Learn how tenant opportunity to purchase acts have been quickly expanding across the country and the complications that arise.

Bob Floss II, Floss Law, Northbrook, IL

Hon. Leslie Hairston, Chicago, IL

12:00 - 1:00 – Lunch (provided by the ISBA)

1:00 – 2:00 Troubleshooting Landlord-Tenants Issues from Both Perspectives

This segment will provide insight into common issues that arise in residential and commercial leasing. Learn how to prevent and mitigate these issues from both the landlord's and tenant's perspectives.

John Brennock, Diaz Anselmo & Associates, LLC, Naperville, IL

Melvin Simms, Tenants Rights Group LLC, Chicago, IL

Aldo Huitzil, Amundsen Davis, LLC, Chicago, IL

2:00 – 2:45 What Real Estate Lawyers Ought to Know About Estate Planning and Probate

Explore the intersection of Real Estate and Estate Planning and Administration. We will review clients' common estate planning goals with regard to real estate and the best practices to implement those goals. We'll examine common misconceptions regarding living trusts, land trusts, joint tenancy, and transfer on death instruments. Finally, we'll learn best practices to avoid pitfalls and disputes and examine the benefits of selling real estate during probate and trust administration.

James S. Cerami, Cerami Law Firm LLC, Oakbrook Terrace, IL

2:45 – 3:00 Break (refreshments provided)

3:00 – 3:45 Clearing Title Exceptions

From common title exceptions to special circumstances, this segment will provide practical tips for clearing title exceptions.

Joe Rogul, Retired, Former Corporate Counsel and Legal Dept. Manager, PNTN, Chicago, IL

3:45- 4:30 Environmental Due Diligence and Commercial Real Estate – A Phase 1 ESA is almost never enough

We will analyze environmental due diligence in commercial real estate transactions – where a Phase I Report is almost never enough. We will discuss various operations in order to seek an all appropriate inquiry related to statutory environmental cleanup liability - i.e., does the buyer qualify as an innocent purchaser, bona fide prospective purchaser or contiguous property

owner? What is seller's role? What are the legitimate concerns of lenders or investors? And, what environmental concerns are associated with a going concern?

William J. Anaya, Greensfelder, Chicago, IL

FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
Administrative Law		Christopher Kendall	Nancy Easum
Agricultural Law	Andrew White, James Kane, Laura Harmon, Ruth Robinson	Garrett Thalgott	Paul Osborn
Alternative Dispute Resolution		Celeste Korando	
Animal Law		Lisa Velez	Lisa Nyuli
Bench & Bar		Sam Limentato	Genevieve Miller
Bus. Adv. & Fin. Planning	David Johnson, Jr.	James Peters	Brian LaCien
Business & Securities Law		Christopher Kendall	H. Case Ellis
Cannabis Law	Nicky Sonntag	Nicky Sonntag	Kimberly Hinkle
Child Law	Deanna Hoyt	Josette Allen	Carol Casey

FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
Civil Practice & Procedure	Joseph Souligne	Michelle Rozovics	Paul Osborn
Commercial Banking		Paul Bach	Paul Osborn
Construction Law	Adam B. Whiteman	Jonathan Safron	Genevieve Miller
Corporate Law Departments	Margo Lynn Hablutzal	Margo Lynn Hablutzal	Lisa Nyuli
Criminal Justice	Sara Vig	Julia Wykoff	Jean Wenger
Education Law	Emma Durante	Walter Zukowski	Carol Casey
Elder Law	Mia Hernandez & Dolores Wigman	Megan Kinney	Britta Johnson
Employee Benefits	Malaika Caldwell	Nemura Pencyla	Genevieve Miller
EUTT	Laura Harmon, Andrew White	Craig Sondgeroth	Paul Osborn
Environmental Law & Natural Resources	Jane McBride	Michael Murphy	Lori Hansen

FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
Family Law	Pam Kuzniar & Genevieve Miller	Staci Balbirer	Pamela Kuzniar
Federal Civil Practice	Christian Ketter	Christian Ketter	Paul Osborn
Federal Tax	Oana Militaru	Philip D. Speicher	Pamela Kuzniar
Food Law	Robert B. Anderson	Robert B. Anderson & Jane McBride (co-chairs)	Susan Rogaliner
General Practice	Penelope Bach, Kimberly Duda, Hector Morales, Elisabeth Ritter	Ashanti Henderson	Annemarie Kill
Health Care	Ann Lozoya, Jim Engleman, Larry Manson	William Davis	Kimberly Hinkle
Human and Civil Rights	Ronald Langacker	Jill Leka	Lori Hansen
Insurance Law		Jennifer Danish	Raymond Riden
Intellectual Property	Margo Lynn Hablutzel	Michael Weil	Britta Johnson

FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
International & Immigration	Angela Peters	Natalia Curto	Jean Wenger
Labor & Employment	Craig Colbrook	Thalia Pacheco-De Loera	Pamela Kuzniar
Local Government	Patrick Collins	Yordana Wysocki	Lisa Nyuli
Mental Health Law	Barbara Goeben	Mark Heyrman	Carol Casey
Mineral Law	Laura Harmon	J. Nelson Wood	Britta Johnson
Privacy & Information Security Law	Kelly Carter, Ioua Alen Lagazo, Aaron Brooks	Tatyana Ruderman	H. Case Ellis
Real Estate	Cheryl A. Morrison	Cheryl Morrison	Susan Rogaliner
Rural Practice Section	Billie Constant	Angel Wawrzynek	
Senior Lawyers	Michael Rooney	David Chroust	Nancy Easum
Sports & Entertainment Law		Whitney Siehl	Kimberly Hinkle
State & Local Tax	David Kupiec & Nicole DeBella	Keith Staats	Brian Fliflet

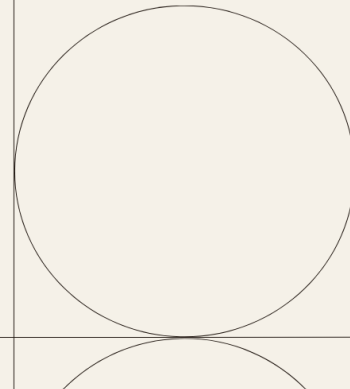
FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
Tort Law	Judith Conway & Josh Rohrscheib	Judith Conway	Raymond Riden
Traffic Laws & Courts	Brick Van Der Snick	Sara Vig	Nancy Easum
Trusts & Estates		Sarah LeRose	Lisa Nyuli
Workers' Compensation	Anita DeCarlo	Deborah Benzing	H. Case Ellis
Young Lawyers	Violet Konopka	Jason Blumenthal	Brian LaCien
Committee			
Standing Committee on Artificial Intelligence & The Practice of Law		Aaron Brooks	Raymond Riden
ARDC		Peter Alexander	Kimberly Hinkle
Corrections & Sentencing		Scott Main	Kimberly Hinkle
Delivery of Legal Services	John Brennock & Bryan Thompson	Kimberly Thielbar	Lori Hansen

FY 25-26
CLE Coordinators and Liaisons

Section / Committee	CLE Coordinator	Section / Committee Chair	CLE Committee Member Liaison
Disability Law	Tom Reuland	Tom Reuland	Susan Rogaliner
Government Lawyers	Patrick Collins	Leilani Pino	Carol Casey
LOME	G. Leighton & Julia Smolka	Nicole Sartori	Nancy Easum
Legal Education Admission & Compliance	Not Appointed	Ted Donner	Jean Wenger
Legal Technology	Brian Flynn	Matthew Huff	Jean Wenger
REM		Lisa Velez	Pamela Kuzniar
SOGI		John Moore	Annemarie Kill
Women and the Law	Jessica Durkin, Debra Thomas, Aggie Baumert	Jessica Marshall	Annemarie Kill

CLE Committee Liaison



<i>Communicate with Assigned Section(s)/Committee(s)</i>	Email the CLE Coordinator and Chair to introduce yourself and how you can assist them with CLE programming. Assist with review of existing on-demand programs and extensions.
<i>Annual Meeting</i>	When possible, attend the business meetings of your assigned sections/committees to introduce yourself and share your role as a resource for them.
<i>Provide Information to Sections and Committees</i>	Offer assistance to CLE Coordinators on reviewing the Annual CLE Report, current on-demand programming, identifying missing content and CLE priorities, requesting program extensions.
<i>CLE Coordinator Training</i>	Communicate with Chair and CLE Coordinator regarding appointment of CLE Coordinator and their attendance for CLE Coordinator Training. Attend training in July.
<i>Section and Committee Meetings</i>	Attend when you can, especially if requested, to provide support for discussions on CLE. Reach out to CLE Coordinator and Chair prior to meetings to remind them of CLE issues and resources and offer your support and resources.
<i>Program Planning</i>	If requested, provide guidance and feedback on CLE Proposals; assist ISBA CLE staff in communicating with sections/committees regarding programs in process or upcoming.
<i>CLE Policies and Proposals</i>	Become acquainted with CLE Policies and Proposal forms. Ensure CLE Coordinator can find policies and forms and understands submission.

**Overview of ISBA CLE Process with CLE Staff
The Journey of Live Web Program
From Proposal through Posting in On-Demand
Catalog**

Key:

CE- Copywriter Editor (Staci)

PC- Program Coordinator (Tara)

RC- Registration and Administrative Coordinator (Kyla)

AA- Administrative Assistant (Skylar)

CAT- CLE On-Demand Catalog (Neelam)

VP – Video Producer (Drew)

**Program Proposal
(3– 4 Months Prior to Program)**

Review and Approval (w/in 2-3 weeks)

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

Add approved title to all 4 ISBA calendars

**PC books videographer and staffers (w/in
4 weeks)**

PC schedules faculty call if requested

Editorial and Marketing Process (0 – 3 months Prior to Program)

**CE drafts working copy of brochure working
with coordinator
(2-3 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
(CLE is limited to 2 emails per week)**

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

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

**AA – enter course in MCLE Board PCAM,
adding PMCLE app when materials come in**

**Speaker/Moderator Contacts
(3-4 months prior to Program)**

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

**PC sends speaker packet when agenda is final
(2 – 3 months prior)**

PC – work with financial contributors, if any

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

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

Program

VP and PC provide staffing for most webcast programs

RC provides customer service for calls on registrations, credit tracking, technology issues, etc.

**After Program
(Immediately – 3 months after)**

PC and RC enter faculty credit into ISBA database and MCLE Board PCAM and generate certificates

**VP edits video into segments and full programs, inserting openers, closers, title pages, etc.
(0-2 months after, depending on volume)**

CAT applies for credit in MCLE Board PCAM and produces and activates in on-demand catalog

CAT repeats above for all courses with accreditation extension requests from sections.

Evaluation and Attestation for Online Courses

- 1.) I certify that I participated in this ISBA program and that I am entitled to claim the complete number of Illinois MCLE credit hours offered. You **MUST** select an answer here to proceed to your MCLE certificate.

Please Note: If you did not attend the full program, please call the ISBA CLE Department at 800-252-8908 before completing the program evaluation so we can adjust your Certificate of Completion to reflect the correct amount of CLE credits earned.

☐ Yes

- 2.) Please select response below: 1=poor, 3=okay, 5=excellent

	1	2	3	4	5
What is your overall assessment of the program?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What is your assessment of the quality of the program materials?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- 3.) Moderator(s): Please select response below: 1=poor, 3=okay, 5=excellent

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- 4.) [PROGRAM TITLE]

	1	2	3	4	5
Materials	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Speaker Name]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- 5.) How did you hear about this program?

- ☐ ISBA Website
- ☐ CLE Marketing Email
- ☐ Print Mailer
- ☐ E-clips
- ☐ Committee or Section Member
- ☐ Word of Mouth

Evaluation and Attestation for Online Courses

6.) What did you like best about this course?

7.) Please select your responses below: 1=poor, 3=okay, 5=excellent

	1	2	3	4	5
Please rate your satisfaction with ISBA's online CLE experience.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8.) Additional comments or testimonial? (please provide name for testimonial)

9.) How would you prefer to attend future CLE programs? (choose one)

- ☐ Live onsite
- ☐ Virtually via the Online Platform

10.) ISBA Member: Are you taking advantage of your Free CLE?

- ☐ Yes
- ☐ No

SAMPLE EMAIL TO SPEAKERS

Hello ISBA Faculty,

Thank you for agreeing to present or moderate your CLE program for the ISBA from your home or office. Your program entitled ***Hidden Challenges: Working with Business Clients Experiencing Mental Distress*** scheduled to be held on **Wednesday, September 13, 2023** from **11:00am-12:30pm (CST)** via **Webcast**.

ISBA's remote presentation format will allow you to present via video while sharing your Power Point slides through the Zoom meeting platform. We will schedule a training session prior to the program. **Please let me know if you are NOT available to train on Tuesday, 9/12/23 from 4:00pm to 4:30pm (CST).** The calendar invitation and login information for your training session will be sent soon. [Please watch this Faculty Training Video](#) **prior** to our training session.

We ask that you complete and return the items identified below via email to the ISBA CLE Program Coordinator at speakerinfo@isba.org by **Wednesday, August 23, 2023**:

- **Course Materials** – Materials are required by Supreme Court Rule 795(a)(5) for MCLE courses. **Please submit materials electronically by e-mail.**

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. Materials should be Word and Power Point only. Please do not submit scanned copies. Scanned PDFs are not accessible to screen readers and also produce inferior print quality.

- **Presentation Agreement** – Please complete, sign and return the attached presentation agreement or fill it out online here: [CLE 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 you 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 cannot 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. Please visit our [ISBA Law Ed Speaker and Moderator Information](#) webpage and/or the attached documents with additional information about your engagement with ISBA including:

General Information about Registration and Product Promotion
Faculty Training Videos and Resources
[Prepare for Your ISBA Recording](#)

We appreciate your participation in ***Hidden Challenges: Working with Business Clients Experiencing Mental Distress*** 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, we 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

217-747-1421

800.252.8908 Ext. 1421

tsanders@isba.org

www.isba.org

GENERAL INFORMATION FOR LAW ED SPEAKERS AND MODERATORS (via Zoom)

Registration: Complimentary registration is automatically provided to all speakers and one moderator. However for live webcasts via zoom, please [email the CLE Program Coordinator](#), if you attend and earn MCLE credit for any session other than the one you are presenting.

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

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

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

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.

PREPARE *for* YOUR ISBA RECORDING



TIPS FOR SHOOTING BETTER VIDEO

1. Choose a setting that feels authentic to establish **credibility** and where everything **visible** on camera serves a **purpose**.
2. Position yourself **near** but **not in front of** a window for more **flattering light**.
3. Maintain enough **distance** from **walls** to avoid ugly **shadows**.
4. **Center** yourself on **camera**.
5. Maintain **eye contact** with the camera to be more **engaging**.
6. Position the camera at **eye level** or **slightly above** to slim the face.
7. Find a location without **echo** or **background noise** for the best **audio quality**.
8. Bring your **enthusiasm** up a notch to engage viewers because the camera absorbs energy.
9. **Smile!**

TIPS FOR CHOOSING YOUR ATTIRE

1. Keep it **clean** and **simple** – clothing and accessories should not distract from the speaker.
2. Avoid **tight repetitive patterns** like high contrast pinstripes, herringbone, houndstooth, and fine checks.
3. Avoid **silks**, **satins**, and **shiny** fabrics.
4. Wear **solid colors**; they look best on camera.
5. Avoid wearing **all black**, **all white**, or **all red**.
6. Your clothes should be **fitted** and follow the **contours** of your body.
7. **Avoid** any accessories that could make noise or distract.
8. Add a **pop of color** with a necktie, pocket square or scarf.



PRESENTATION AGREEMENT
Illinois State Bar Association
424 S. Second St., Springfield, IL 62701
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, 2023**.

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 U.S. Government employee. _____ [b] This Work was written as part of my assigned job or official duties as a U.S. Government employee.



Law Ed Presenter Information

(Optional) The ISBA strives to have diversity among presenters. If you self-identify as a member of a diverse group, please state which group(s): _____.
Diversity group identification is used solely for internal purposes, will be treated as confidential, and not shared (other than in the aggregate for statistical purposes) by the ISBA.

SAMPLE MARKETING EMAIL TO SPEAKERS

ISBA Law Ed: Disability 6-20 MARKETING YOUR PROGRAM!

To: Speaker

From: Tara Sanders, ISBA CLE Program Coordinator

Hello ISBA Faculty,

On behalf of the Illinois State Bar Association, I would like to thank you again for agreeing to participate in the upcoming CLE seminar titled, "What's New in Illinois Disability Law and Federal Social Security Law."

Although we are marketing your program in a number of ways – from print mailers to blog posts, we invite you to use your preferred social media platforms to share and comment on your involvement in the program so others are aware of your generous contributions to the profession through CLE! As a speaker, you can also give potential registrants greater insight into what they can expect to learn.

If you are new to social media, you might post something like this:

- I look forward to speaking for the Illinois State Bar Association on [date] regarding [these topics].
- I am presenting a CLE webcast for attorneys on [date] on [topics] for the Illinois State Bar Association 's [official program name]. Join me as we cover...
- Join me as I talk about the one topic I know backward, forward, and sideways! Did you know? It's true!

Of course, if it is simpler for you, just forward the attached color flyer to those colleagues that you feel may be interested in and/or benefit from this seminar.

You and your firm/organization have permission to use the attached graphic and flyer to promote your involvement in this program. You may also "like" and "follow" @ISBALawyer on all of our social media platforms, as well.

LinkedIn

Twitter

Facebook

Instagram

YouTube

If you have any questions or need assistance promoting your program on social media, please reach out to the ISBA Media Manager, Celeste Niemann at cniemann@isba.org.

Thank you,

Tara Sanders | CLE Program Coordinator

Illinois State Bar Association

217-747-1421

800.252.8908 Ext. 1421

tsanders@isba.org

SAMPLE INVITATION FOR SPEAKER TO INVITE COLLEAGUES



The First Amendment: In the Classroom, On the Quad, and Beyond

Presented by the ISBA Education Law Section

Dear Fellow Practitioner,

I would like to personally invite you to attend ISBA's upcoming CLE program titled, "[The First Amendment: In the Classroom, On the Quad, and Beyond](#)," which I will be co-presenting via the Internet on **Wednesday, June 14, 2023**.

School districts and higher education institutions continue to grapple with the issue of balancing freedom of speech and the exchange of diverse perspectives with cultivating welcoming educational work environments. Join us as our presenters draw upon their experiences working with school districts and higher education institutions and share their insights on this timely topic. Topics include: a look at the First Amendment issues and challenges; freedom of speech protections under the law; how to create educational and work environments that are free from discrimination and harassment; and how to identify and address First Amendment issues throughout the educational environment. The seminar is presented by the **ISBA Education Law Section** and 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!]*

Wednesday, June 14, 2023

12:00 – 2:00 p.m.

Live Webcast

[Register Here.](#)

\$60/Members; \$100/Non-Members

Sincerely,

(Speaker name here)

FACULTY VIDEO RESOURCES

Short Faculty Development Videos



ISBA Faculty Zoom Training

Tips for creating a smooth CLE presentation on Zoom.



The Top Tips to Deliver a Fantastic Virtual Presentation

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



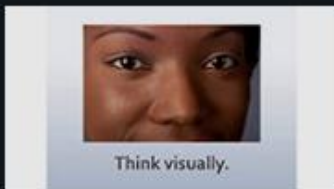
Engaging Your Audience

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

FACULTY GUIDELINES FOR COURSE MATERIALS

Why Prepare Great Course Materials and Submit them On Time?

1. Materials reinforce the learning objectives conveyed to the audience in your presentation.
2. You will learn more about the subject through the preparation of materials.
3. You will earn MCLE credit for prep time for up to 6 times your presentation time.
4. You will increase your credibility, enhance your reputation, and improve potential business opportunities.
5. You will better serve your legal audience and your evaluation scores will improve.
6. Attendees expect your complete set of great materials to be in the course book.
7. Your well-developed materials in the course book, demonstrates you can meet deadlines, which will improve your reputation and enhance opportunities for referrals from audience members.
8. If your materials are not in the course book, it may reflect negatively on your organizational skills and generate negative evaluation comments.
9. If you don't submit materials by the deadline, it will be your responsibility and expense to copy handouts of your materials for attendees.

FACULTY GUIDELINES FOR COURSE MATERIALS

What Does ISBA Expect?

1. **“Thorough, high quality, readable and carefully prepared written materials” (S.Ct. Rule 795(5)).**
2. **Original materials (preferred).**
If copyrighted materials are submitted, you must provide written permission for ISBA to use or they will not be included in the course book. ISBA cannot use Lexis and Westlaw materials.
3. **Materials submitted to ISBA electronically.**
Word and Power Point only; scanning hard copies produces an inferior print quality.
4. **Materials submitted by the required deadline so they are in the Law Ed course book.**
 - *Typically due 4 weeks prior to the program date*
 - *This allows ISBA time to apply for Illinois Supreme Court Commission on Professionalism credit*
5. **Supplemental Power Point slides to highlight important points, submitted in advance for inclusion in the course book.**
Do not include all 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.

FACULTY GUIDELINES FOR COURSE MATERIALS

Top 10 Tips for Terrific Law Ed Materials

1. Establish learning objectives for your presentation and make sure the materials support your objectives.
2. Write materials that will provide a complete, independent legal resource after the program is over.
3. Stay on topic by delivering information about the topic described in the original brochure promoting the program.
4. Provide original language or your own paraphrase whenever possible.
5. Don't attach copies of statutes or cases unless you are presenting from the actual language of the attachment, rather provide e-links to an online version such as Fastcase.
6. Provide forms if pertinent; attendees love them.
7. Provide full citations of all cases and resources that you reference.
8. Organize with headings, subheadings, etc. for readability.
9. Edit for grammar, punctuation, proper word usage, and spelling. Your Law Ed materials reflect your work quality.
10. Remember, your Law Ed materials reflect your work quality, so represent yourself well with great materials.

FACULTY GUIDELINES FOR COURSE MATERIALS

ISBA Law Ed Formatting and Submission Requirement

1. **The ISBA CLE Editorial Staff accepts original speaker materials in MS Word and Power Point only.** Please do not submit your materials in PDF format! The only exceptions to this are court dockets, materials extracted from FastCase (or similar database research center), articles/information taken from print magazines, copies of a case or statute, etc. (In essence, things that you, the author, did not create yourself, but have secured and provided written permission for ISBA to reprint.)
2. **All original materials should be:**
 - a. Typed in 12-point font
 - b. Double-spaced
 - c. Paginated (center bottom)
3. **All materials (including bios) should be submitted to the ISBA CLE Editorial Staff no later than four weeks 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 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 be left out -- to the detriment of the online viewer *and your evaluation rating*. Also, all Professional Responsibility topics must have approval of the Illinois 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).**
5. **Power Point slides are meant to highlight important points!** While Power Point slide shows are a great way to engage your audience during presentations, they are not the appropriate way to present *all* your information. Please limit the amount of information included on each slide. You should use an additional text document to present the bulk of your materials and reference information.
6. **Please submit your bio with your materials!** Every ISBA course book contains a "biography" section, which is our way of giving credit where credit is due. Bios are a way for speakers to advertise themselves...to flaunt their accomplishments, so to speak. Bios submitted late will not be included in the ISBA course book.

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

CONFIDENTIAL – FOR ISBA INTERNAL USE ONLY

ISBA CLE Pricing

A. FULL AND HALF DAY PRICES FOR LIVE AND VIDEO-REPLAY

LAW ED PROGRAMS

	Full Day (5.0 hrs or more)	Late* Full Day	Half Day(3.5 – 4.5 hrs)	Late* Half Day
Member	\$ 150	\$ 165	\$115	\$130
Non-Member Lawyer and Non-Lawyers	\$310	\$ 325	\$ 250	\$ 265
New Attorney Members**	\$25	\$25	\$25	\$25
Master Series	\$ 210 member \$ 410 non-me	\$ 225 member \$ 425 non-me	\$ 165 member \$ 320 non-me	\$ 180 member \$ 335 non-me

*Late Registration--Registration received later than one week (seven days) prior to the program.

**New Attorneys Members—In their first five years of bar admittance. No other discounts apply.

Includes Master Series.

ISBA Law Student ISBA Members attend regular programs free, space permitting (lunch extra). D not include Master Series.

B. SPECIAL PRICE DISCOUNTS

	All Full Day and Half Day Programs	Master Series
Legal Services Attorney*	ISBA Memb.-\$25 Non-Memb.-\$75 half day; \$100 full day(<i>No other dis</i>	ISBA Memb.-\$25 Non-Memb.-\$7 half day; \$100 full day(<i>No other d apply</i>)
Sponsoring Section Member Discount	\$10	None

*Legal Services Attorney—An attorney who works for a not-for-profit, non-governmental organization whose mission is to provide quality civil legal assistance to low income people and v works full-time or part-time, if the attorney is receiving no other income from the practice of law.

C. MISCELLANEOUS ITEMS

	<i>Member Prices</i>	<i>Non-Member</i>
--	----------------------	-------------------

A La Carte/Hourly Live CLE	\$ 35 per MCLE credit hour (except bundles of 15 hrs or more - \$25 per hour)* <i>(LSA and New Atty. Discounts and section member discounts)</i>	\$70 per MCLE credit hour <i>(LSA discount-no other discounts)</i>
On-demand CLE Hourly Price	\$35 Member per MCLE credit hour <i>(LSA, New Attorney and Section member discounts)</i>	\$ 70 non-member per MCLE credit hour <i>(No other discounts apply)</i>
Lunch at programs	Additional fee to cover cost of lunch at all programs (\$20 at CRO)	Additional fee to cover cost of lunch at all programs (\$20 at CRO)
Off-site Recorded CLEs	Add to fees to cover additional Audio Visual Expenses	Add to fees to cover additional Audio Visual Expenses
Multi-Day	<i>TBD on program-by-program basis</i>	<i>TBD on program-by-program basis</i>
Print book	\$50 1-day program/\$75 2-day program	\$50 1-day program/\$75 2-day program

G\CLE\Pricing\CLE Price List.Amended 12.2023 and implemented starting with March 1, 2024 programming

ISBA Law Ed Destination CLE Guidelines

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

- I. ISBA Destination CLE programs require third-party financial supporters.**
- II. ISBA may conduct Destination CLE with third-party financial supporters in accordance with the following:**
 - A.** A Destination CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee one year in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if target numbers are not met. The request must include:
 1. Program Date
 2. Identification of any potentially conflicting events
 3. Preferred Location
 4. Number of MCLE Hours to be offered
 5. Number of Speakers to be invited
 6. Identification of potential financial supporters
 - B.** A Complete and Final Destination CLE Program Proposal must be submitted to the ISBA CLE committee nine months in advance of the program using standard Law Ed proposal forms and must identify confirmed financial supporters and amount pledged, program and topic descriptions, confirmed speakers, and other standard proposal information.
 - C.** Only programs designed to break even or better on costs (based on ISBA CLE Committee revenue/expense estimates) will be offered. Target registration numbers will be established by set dates to determine if the program will meet this goal or if the program will be cancelled.
 - D.** Master Series Speakers in the vicinity of the destination program are encouraged to reduce reimbursement expenses.
 - E.** If volunteer speakers are used, they must be ISBA members, unless affiliated with the financial supporters.
 - F.** Destination CLE reimbursements for speakers and moderators shall comply with current ISBA Law Ed speaker reimbursement policies for in-state Law Ed programs.

- G.** A section or committee may propose a destination CLE program no more than once during an ISBA fiscal year from July 1 – June 30
- H.** ISBA will be the contracting party and will review and approve the hotel contract for the Destination CLE to ensure the ISBA is properly protected and that the terms are appropriate and reasonably consistent with other ISBA hotel contracts.
- I.** The program will comply with MCLE Board Accredited Provider standards.
- J.** Financial supporters of ISBA Destination CLE shall sign a Letter of Understanding drafted by the ISBA and documenting the obligations of the supporter. Issues that shall be addressed in the Letter of Understanding include, but are not limited to:
 - 1. Speaker reimbursement terms
 - 2. Hotel expense responsibilities
 - 3. Acknowledgments that any financial supporter materials provided for the Law Ed course book will be in accordance with ISBA copyright permission requirements
 - 4. Trademark uses
 - 5. Rejection of joint venture or agency status
 - 6. Agreement that the financial supporter's presentation at the Law Ed program, if any, will not be merely a sales pitch
 - 7. Agreement that the financial supporter will not misrepresent its arrangement with ISBA in any future marketing to Illinois lawyers
 - 8. Designation of responsibilities for books, MCLE credit tracking, etc.
 - 9. Financial supporter use of or references to the ISBA name in advertising or other financial supporter materials
 - 10. Various other standard contract terms
- K.** Third-Party Financial Supporters
 - 1. Agreements with third-party financial supporters shall be consistent with other contracts held by the ISBA.
 - 2. Opportunities for financial supporters:
 - a. Exhibitor opportunities at the CLE event
 - b. Opportunities to collect business cards/contact information from attendees
 - c. Speaking opportunities at the event, if:
 - The topics are creditable as MCLE
 - The speaker does not market the product during the presentation
 - 3. Financial supporters may not represent that their financial support of an ISBA event is an endorsement by ISBA of their products or services

ISBA Law Ed
Financial Contributor Subsidized CLE Guidelines

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

- I. ISBA Financial Contributor Subsidized CLE programs require compliance with the financial contributor policy (See Attached Policy)**
- II. ISBA may approve Financial Contributor Subsidized CLE with third-party financial supporters in accordance with the following:**
 - A.** A Financial Contributor Subsidized CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee nine months in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if funding is not timely received. The request must include:
 - 1. Program Date
 - 2. Identification of any potentially conflicting events
 - 3. Preferred Location
 - 4. Number of MCLE Hours to be offered
 - 5. Number of Speakers to be invited
 - 6. Identification of potential financial supporters and amounts to be collected
 - 7. Proposed pricing of program
 - K.** 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.
 - L.** 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.
 - M.** Single venue programs are required to control reimbursement expenses
 - N.** If volunteer Illinois attorney speakers are used, they must be ISBA members, unless affiliated with the financial supporters.

- O.** 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.
- P.** 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
- Q.** 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.
- R.** The program will comply with MCLE Board Accredited Provider standards.
- S.** 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