LIVE ONSITE* PROGRAM
2015-16 Program Proposal
Illinois State Bar Association

Complete proposal forms must accompany all proposals.
*Live onsite at any location. Live onsite in Chicago office has the option of simultaneous live webcast

Submission Deadlines -- Presentation Periods:

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<th>Date</th>
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<td>5/15</td>
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Form is also available at: www.isba.org/cle/coordinators

Please Submit a Typed Form

EXAMPLE PROGRAM PROPOSAL

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

A. Sponsoring Section Council/Standing or Special Committee: State & Local Tax Committee

B. Co-sponsoring ISBA Section Council(s) or Committee(s): ____

C. Title of proposed program (keep it short, simple, and catchy): 2017 Recent Developments in State & Local Tax

D. Person(s) submitting proposal (Name, address, telephone number, e-mail address, and section):
   David Kupiec
   ABC Law Firm
   123 Street Name Rd.
   City, IL 12345
   123-456-7890
   Sample@email.com

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

F. Requested Location and Date(s) For Live Onsite Programs:
   ☒ Chicago Only; Date(s): Friday, January 27, 2016
   ☐ Chicago & Other Location within State (indicate preferred location(s), if any, and date(s)) ____
   ☐ Other Location within State (indicate preferred location, if any, and date(s)) ____

G. Program Length:
   (To have a live onsite audience, the program must be at least a half-day in length. Shorter programs will be live webcasts or live webinars for remote audiences and ISBA archives.)
☐ All day (9:00 a.m. to at least 4:00 p.m.)
☒ Half day (at least 3.5 hours)

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

I. Professional Responsibility MCLE credit, if included: PMCLE topics (professionalism, diversity issues, mental illness and addiction issues, civility, and legal ethics) must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours: None

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

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

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

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

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

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

☒ Certified Public Accountants* (*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)
☐ Other Organizations/Agencies _____
ISBA Law Ed LIVE ONSITE* Program Agenda Template

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

Program Title: 2017 Recent Developments in State & Local Tax
Sponsoring Section: State & Local Tax

To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)
State & Local Tax Attorneys or other Attorneys with an interest in state tax practicing at law firms, industry or governmental agencies

To what level of practice experience is this program directed?

☐ Basic ☑ Intermediate ☑ Advanced

Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?
The purpose of this program is to update the participants as to recent changes in statutory, regulatory, case law and policy concerning Illinois State and local taxes

Lead Coordinator Name, Address, Telephone Number, E-mail Address: (Complimentary program registration is provided for one coordinator.)
David J. Kupiec, JD, CPA
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

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

Moderator Name, Addresses, Telephone Number, E-mail Address
David J. Kupiec
See Above

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

- Speaker will agree to submit materials and Power Point 4 weeks prior to program date for MCLE topics and 6 weeks prior to program date for PMCLE topics
- Speaker will agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products
- Speaker agrees to arrive not less than 30 minutes prior to presenting
- Speaker is an ISBA Member or I will invite the presenter to join ISBA (http://www.isba.org/membership/join)
When drafting the Program Agenda, include the following information for each segment topic:

Please attach additional pages for each segment as needed.

- **Topic Title** State Tax Legislative Issues That Businesses Are Concerned About
- **Topic Length** (in 15-minute increments only) ___45 minutes___
- **Topic Description** (2-3 sentences) Representatives from the Illinois Chamber of Commerce and the Taxpayers’ Of Illinois address state tax legislative issues that impact their members. This session will also include a discussion of proposed and potential Legislative items that the business community supports as well as items that impact all Illinois residents.

- **Presenter Name, Address, Telephone Number (cell and office), & E-mail Address _____**

Carol S. Portman
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

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

- **(optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website _____**

- **If using out-of-state presenters, please include justification: _____**

- **Topic Title** Illinois Department of Revenue Update
- **Topic Length** (in 15-minute increments only) ___45 minutes___
- **Topic Description** (2-3 sentences) This session provides an Illinois Department of Revenue update on current tax and administrative issues as well as recent Department policy changes.
- **Presenter Name, Address, Telephone Number (cell and office), & E-mail Address _____**

Mark Dyckman
ABC Law Firm
Brian E. Fliflet
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website ______
✓ If using out-of-state presenters, please include justification: ______

✓ Topic Title Cook County and City of Chicago Tax Changes and Court Case Update
✓ Topic Length (in 15-minute increments only) ___ 45 minutes ___
✓ Topic Description (2-3 sentences) An overview of recent Cook County and City of Chicago tax changes including changes to Chicago’s lease tax, amusement tax as well as a discussion concerning recently issued and pending court cases.
✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address

Stanley R. Kaminski
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

David J. Kupiec
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website ______
✓ If using out-of-state presenters, please include justification: ______
✓ Topic Title Recent Illinois Property Tax Legislative Changes, Court Decisions and Issues To Monitor
✓ Topic Length (in 15-minute increments only) ___ 60 minutes ___
✓ Topic Description (2-3 sentences) This panel presentation addresses the property tax issues that are currently being considered by the Illinois General Assembly, as well as potential policy issues and recent court decisions.
✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address ______

Timothy E. Moran
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com
John K. Norris
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Gary H. Smith
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website ______
✓ If using out-of-state presenters, please include justification: ______

✓ Topic Title ______Recent Illinois Income, Franchise & Sales Tax Legislation, Court Decisions, Regulations and Issues to Monitor
✓ Topic Length (in 15-minute increments only) ______45
✓ Topic Description (2-3 sentences) This session provides an overview of recent Illinois income, franchise and sales tax issues being addressed by the Illinois Courts as well as the recently enacted sales and income tax legislation.
✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address ______

David P. Dorner
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

Natalie M. Martin
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website ______
✓ If using out-of-state presenters, please include justification: ______
Please attach your Program Agenda to this completed Form.
Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:
CLE Department, Attn: Janean Goby
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712  e-mail: jgoby@isba.org

Thank you for your proposal!

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

THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

What you can expect:

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

- Your agreement to submit written materials, legal forms, and/or PowerPoint presentation at least 4 weeks prior to program date for MCLE topics and 6 weeks prior to program date for PMCLE topics
- Your agreement to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products
- Your agreement to arrive not less than 30 minutes prior to presenting
- Your membership in ISBA – or consideration to join ISBA (http://www.isba.org/membership/join)
- Your agreement to be videotaped by submitting a signed ISBA presentation agreement
- Your agreement to review the Checklist for Professional Responsibility topic presentations if you are presenting a segment that qualifies for PMCLE credit (www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf)
- Your review and completion of all or part of ISBA’s Faculty Development Series (www.isba.org/cle/faculty)
- Your agreement to comply with the ISBA travel reimbursement guidelines and limitations
STUDIO or WEBINAR PRESENTATIONS*
2015-16 Program Proposal
Illinois State Bar Association

Complete forms must accompany all proposals.

*NO ONSITE AUDIENCE.

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

Submission Deadlines* — Recording Periods:

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

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

Please Submit a Typed Form

EXAMPLE PROGRAM PROPOSAL

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

A. Sponsoring Section Council/Standing or Special Committee: Administrative Law Section Council

B. Co-sponsoring ISBA Section Council(s) or Committee(s): International and Immigration Law Section Council

C. Title of proposed program (keep it short, simple, and catchy!): Immigration Hearings: How to Get the Job Done

D. Person(s) submitting proposal (Include name, address, telephone number, e-mail address, and section committee on which you serve):
   Tracy Douglas
   ABC Law Firm
   123 Street Name Rd.
   City, IL 12345
   123-456-7890

Sample@email.com

E. Requested Program Date(s)*: March 23
   *If Hot Topic Expedited Date is Requested, Provide Justification _____

F. Short Program Length, indicate time: (1-2 hours recommended) 1 hour
G. ☒ I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks.

H. Professional Responsibility MCLE credit, if included: PMCLE topics (professionalism, diversity issues, mental illness and addiction issues, civility, and legal ethics) must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs; any presenter/topic segments within this hour or half-hour must be in increments of 15 minutes for MCLE credit purposes. Please indicate the number of proposed PMCLE credit hours: 1

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

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

MARKETING THE PROGRAM

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

ISBA Sections
☒ Administrative Law
☐ Agricultural Law
☐ Alternative Dispute Resolution
☐ Animal Law
☐ Antitrust
☐ Bench & Bar
☐ Business Advice & Financial Planning
☐ Child Law
☒ Civil Practice
☐ Commercial Banking, Collections & Bankruptcy
☐ Construction Law
☐ Corporation Securities & Business
☐ Corporate Law Department
☒ Criminal Justice
☐ Education Law
☐ Elder Law
☐ Employee Benefits
☐ Energy, Utilities, Transp. & Telecomm.
☐ Environmental Law
☒ Family Law
☐ Federal Civil Practice
☐ Federal Tax
☒ General Practice
☐ Health Care
☒ Human Rights
☐ Insurance Law
☐ Intellectual Property
☒ International & Immigration Law
☐ Labor & Employment

☐ Local Government
☐ Mineral Law
☐ Real Estate
☐ Senior Lawyers
☐ State & Local Tax
☐ Tort Law
☐ Traffic Laws & Courts
☐ Trusts & Estates
☐ Workers' Compensation
☒ Young Lawyers

ISBA Committees
☐ ARDC
☐ Corrections and Sentencing
☐ Disability Law
☒ Government Lawyers
☐ Law Office Management & Economics
☐ Legal Technology
☐ Mental Health Law
☐ Military Affairs
☒ Racial and Ethnic Minorities
☐ Sexual Orientation and Gender Identity
☒ Women and the Law
☐ Other ______

☐ Certified Public Accountants* (*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)
☐ Other Organizations/Agencies____
Program Title: Immigration Hearings: How to Get the Job Done

Sponsoring Section: Administrative Law Section Council

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

☐ Basic □ Intermediate □ Advanced

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

A person comes to you with notice of an immigration hearing. How would you handle the case? Attendees will learn the nuts and bolts of how immigration hearings work and how to best represent their clients.

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

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

Interviewer/Moderator Name, Addresses, Telephone Number, E-mail Address
Patrick Kinnally
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

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

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

Directions for Preparing the Program Agenda and Submitting Program Proposal

When drafting the Program Agenda, include the following information for each segment topic:

Please attach additional pages for each segment as needed.

✓ Topic Title: Immigration Hearings: How to Get the Job Done
✓ Topic Length (in 15-minute increments only) 1 hour
✓ Topic Description (2-3 sentences) How do immigration review hearings go? A panel of immigration attorneys will explain how hearings proceed and how to best represent your client in an immigration hearing.
✓ Presenter/Panelist Name, Address, Telephone Number, & E-mail Address _____
✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website _____
✓ If out-of-state presenter, please include justification: _____
Patrick Kinnally
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

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

✓ (optional) One web address to link from the ISBA program webpage to the speaker’s biographical information or firm website _____

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

What you can expect:

☐ Contact from the ISBA CLE Coordinator to confirm the dates and times for your presentation
☐ Contact from the ISBA CLE Department regarding deadlines and program information
☐ Publicity for you and your firm in ISBA brochures, marketing emails, and/or color flyers, as well as on our website and in the course materials
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☐ Your agreement to arrive not less than 30 minutes prior to presenting
☐ Your membership in ISBA – or consideration to join ISBA
Your agreement to be videotaped by submitting a signed ISBA presentation agreement

Your agreement to review the Checklist for Professional Responsibility topic presentations if you are presenting a segment that qualifies for PMCLE credit (www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf)

Your review and completion of all or part of ISBA’s Faculty Development Series (www.isba.org/cle/faculty)

Your agreement to comply with the ISBA travel reimbursement guidelines and limitations