



***CLE Coordinator Playbook
for Program Planning***

June 2017

CLE Coordinator Playbook for Program Planning

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CLE Coordinator Role

ISBA CLE Coordinator – Volunteer Position Description
2017-18

SUMMARY OF RESPONSIBILITIES

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

PRIMARY RESPONSIBILITIES

- At the beginning of the bar year:
 - Review the Annual CLE Committee report with the CLE Committee liaison which includes the section or committee's CLE history, master CLE curriculum calendar with upcoming assigned dates, past program evaluations and more
 - Take an ISBA Online CLE program to understand the experience of our members, since 80% of ISBA CLE hours are delivered online
 - Review all ISBA Online CLE content for your subject area and expirations dates (2 years after presented) to identify deficits and plan programming to fill those deficits
 - Identify any of your section or committee Online CLE programs with accreditation expirations dates that should be extended because the content is still current and beneficial for viewing and request an accreditation extension via the form at www.isba.org/cle/coordinators
- Plan and formally propose the number of CLE programs requested by the CLE committee for the section or committee you represent, including the requested number of webcasts or webinars
- Submit proposals by the CLE deadlines occurring during the bar year for which you are appointed
- Work closely with the section council or committee you represent to 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
- Other responsibilities as they arise

QUALIFICATIONS

- Willingness to advance the ISBA Law Ed mission to provide the best CLE to enhance professionalism and promote the successful practice of ISBA members
- Ability to work well and communicate effectively with people, particularly professionals
- Experience with ISBA Law Ed or a willingness to learn about ISBA Law Ed
- Willingness to give back to the profession
- Law degree or experience in the field of law or legal education preferred
- A high level of initiative



Coordinator Planning Information

- a. Programming Expectations
- b. CLE Coordinator Checklist for Successful Programming
- c. Example Program Proposals
 - a. Live On-Site Program – Full or Half Day
 - b. Webcast or Webinar
- d. Developing and Incorporating Polling Questions
- e. Table Clinic Proposal Template
- f. Planning Panel Presentations
- g. Online CLE Accreditation Extension Request



Section & Committee Annual Programming Expectations
Requested Minimum Number of CLE Proposals per Section or Committee
2017-2018 Fiscal Year

WEBCASTS/WEBINARS

Section	One to Two Hour Live Webinars or Studio Webcast Programs¹ (Panel Format)
Administrative Law	1
Agricultural Law	2
Alternative Dispute Resolution	2
Animal Law	1
Bench and Bar	1
Business Advice, Collections, & Financial Planning	2
Business & Securities Law	2
Child Law	1
Civil Practice & Procedure	2
Commercial Banking, Collections, & Bankruptcy	2
Construction Law	2
Corporate Law Departments	2
Criminal Justice	2
Education Law	1
Elder Law	2
Employee Benefits	1
Energy Utilities Trans & Tele	1
Environmental Law	1
Family Law	2
Federal Civil Practice	2
Federal Taxation	2
General Practice, Solo and Small Firm	2
Health Care	2
Human Rights	1
Insurance Law	2

¹ It is recommended that the sections and committees with two webcast/webinars requested present one in the spring and one in the fall each year.

Intellectual Property	1
International & Immigration Law	2
Labor & Employment Law	2
Local Government Law	2
Mineral Law	1
Real Estate	2
Senior Lawyers	1
State & Local Taxation	2
Tort Law	2
Traffic Laws & Courts	2
Trusts & Estates	2
Workers' Compensation	2
Young Lawyers Division	1
Committees	
Committee on ARDC	1
Committee on Corrections & Sentencing	2
Standing Committee on Disability Law	2
Committee on Government Lawyers	2
Committee on Law Office Management & Economics	2
Committee on Legal Technology	1
Committee on Mental Health Law	1
Committee on Military Affairs	2
Committee on Racial & Ethnic Minorities	2
Committee on Sexual Orientation & Gender Identity	2
Standing Committee on Women & the Law	2

LIVE ONSITE PROGRAMS

Based on Section Size

Section/Committee	Live Onsite Programs Requested
Civil Practice & Procedure	2
Commercial Banking, Collections, & Bankruptcy	1
Criminal Justice	1
Elder Law	1
Family Law	2
General Practice, Solo and Small Firm	1
Labor & Employment Law	1
Tort Law	1
Real Estate	2
Trusts & Estates	2

LIVE ONSITE PROGRAMS

Based on Historical Practice

Section/Committee	Live Onsite Programs Requested
Agriculture Law	1
Animal Law	1
Bench and Bar	2
Business and Securities (biennial Back to Basics)	1
Child Law (biennial Back to Basics)	1
Delivery of Legal Services	1
Environmental Law	1
Federal Civil Practice	1
Federal Taxation	1
Insurance Law (biennial Back to Basics)	1
Senior Lawyers	1
Traffic Law and Courts	2
Workers Compensation (biennial Back to Basics)	2
Young Lawyers	1

I. Proposal expectations are based on historical program success and "active"² membership numbers:

- Sections with active membership of less than less than 250 are not expected to present a live onsite program, but are expected to present at least one studio program per year.
- Sections with active membership of 250 - 700 are not expected to present a live onsite program but are expected to present at least two studio programs per year.
- Sections with active membership of 700-1500 are expected to propose at least two studio programs and one live onsite program title per year, including a Back to Basics program biannually.
- Sections with active membership of more than 1500 are expected to propose at least two studio programs and two live onsite program titles per year, including an annual Back to Basics program.

II. Back to Basics

As part of the expected programs, Back to Basics programs are recommended for the following section councils on an annual or biennial basis. All Back to Basics program will be offered with an on-site audience.

Annual:	Biennial:
Civil Practice and Procedure	Child Law
Family Law	Commercial Banking, Collections, and Bankruptcy
Real Estate	Business and Securities
Tort Law	Criminal Justice
Trusts and Estates	General Practice, Solo and Small Firm
	Insurance Law
	Labor and Employment
	Workers' Compensation

III. Electronic CLE

- To meet current market demands for increased electronic CLE and to improve the quality of ISBA CLE, the sections and committees indicated in the chart above should plan and provide:
 1. A minimum of two electronic CLE programs, one to two hours in length, in an interview/panel presentation format. This program may be a new topic or a highly rated repeat topic from one of the live programs.
 2. Additional hot topic one to two hour CLE electronic programs, upon request, if a topic warrants a short program.
- Live programs of one to two hours total length may be moved to live studio production in lieu of live presentation.
- Live programs with historical attendance of less than 20 may be moved to live studio production in lieu of live presentation.

² Active Membership is based on dues paying Section Members

Section Council Active* Membership Counts - As of 4/30/2017

Administrative Law	194
Agricultural Law	266
Alternative Dispute Resolution	458
Animal Law	100
Antitrust	83
Bench & Bar	229
Bus. Adv. & Fin. Planning	416
Business & Securities Law	582
Child Law	209
Civil Practice	1,939
Commercial Banking	727
Construction Law	251
Corporate Law	375
Criminal Justice	800
Education Law	212
Elder Law	658
Employee Benefits	172
Energy, Utilities, Transportation & Telecommunications	92
Environmental Law	223
Family Law	1,648
Federal Civil Practice	279
Federal Tax	393
General Practice	731
Health Care	384
Human Rights	84
Insurance Law	470
Intellectual Property	347
International Law	191
Labor & Employment	814
Law Office Management and Economics	232
Legal Technology	210
Local Government	503
Mineral Law	74
Real Estate	1,915
State & Local Tax	276
Tort Law	1,165
Traffic Laws & Courts	534
Trusts & Estates	1,701
Workers' Compensation	679

* Active Membership is based on dues paying section members



CLE Coordinator Checklist For Successful Programming

Program Composition

Did you . . .

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

Faculty Recruitment

Did you . . .

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

Moderator Selection

Did you . . .

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

Proposal Submission

Did you . . .

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

- ☐ ...provide two to three sentence descriptions for each session, including what the attendees will learn?
- ☐ ...submit your fully completed proposal form and agenda to ISBA staff by the proposal deadline?
- ☐ ...know that if your program agenda is lacking sufficient information to market and price the program by six weeks prior to the presentation date, ISBA reserves the right to postpone or reschedule the presentation date and may require resubmission of the proposal to the CLE committee

Following Program Approval

Did you . . .

- ☐ ...schedule a telephone conference 7-8 weeks prior to the program for all presenters, the moderator, and yourself to confirm topics, reinforce materials deadlines, plan panel discussions and address questions?
 - Contact ISBA staff if you would like assistance in providing you with telephone conference capabilities for your pre-program conference
- ☐ ...approve the agenda formatted by ISBA staff for promotional purposes?
 - Promotions will be distributed only after final approval from the CLE Coordinator
- ☐ ...assist ISBA staff in contacting speakers for materials, if requested?
- ☐ ...notify ISBA staff immediately of any speaker cancellations and replacements prior to the program?
- ☐ ...know ISBA staff will secure all venues, order refreshments, send speaker packets, collect materials, assist with AV needs, provide onsite coordination, collect and tabulate evaluations, send speaker thank you letters and produce and publish programs in the ISBA Online CLE archives?



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:

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

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

Please Submit a **Typed** Form

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

Directions for Preparing the Program Agenda and Submitting Program Proposal

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

Please attach additional pages for each segment as needed.

- ✓ **Topic Title** 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
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com

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:

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

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

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

Please Submit a Typed Form

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** _____

ISBA Law Ed **STUDIO or WEBINAR PRESENTATION** Program Agenda Template

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

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

Program Title: 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)

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?

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 www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf
- Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty
- If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters

Directions for Preparing the Program Agenda and Submitting Program Proposal

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

- ✓ **Topic Title:** 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!

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

Developing & Incorporating Polling Questions

BENEFITS

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

HOW TO INCORPORATE POLLING IN YOUR POWERPOINT

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

POLLING YOUR AUDIENCE USING POLL EVERYWHERE

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

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

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

Audience Engagement Polling Participant Instructions

Texting Your Vote via Your Smart Phone

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

TABLE CLINIC OPTIONS AND BENEFITS

1. TABLE CLINIC PRESENTATION FORMAT

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

2. TABLE CLINIC LIVE PROGRAM BENEFITS

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

2. TABLE CLINICS WITH VIDEOS FILMED AFTER THE TABLE CLINICS

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

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

SAMPLE AGENDA TEMPLATE

_____**LAW TABLE CLINIC SERIES**

Presented by the ISBA _____Section

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

Join us as our speakers lead interactive discussions on a number of key _____ law topics, including ...

This interactive innovative CLE format gives you ample opportunity to ask questions, clarify issues, and discuss concerns with faculty members during each presentation. Each table clinic lasts 30 minutes with attendees moving from table to table throughout the day. The series is open to all levels of practice experience, but designed with _____ attorneys in mind.

Program Coordinator/Moderator:

Name, Firm, City

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

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

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

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

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

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

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

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

- **Topic Three – Room C**

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

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

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

30 Minutes - Lunch (provided)

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

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

- **Topic One - Room A**

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

- **Topic Two – Room B**

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

- **Topic Three – Room C**

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

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

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

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

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

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

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



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

Program Title: _____

Sponsoring Section or Committee: _____

CLE Coordinator Making the Request: _____

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

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

Date Submitted: _____

SUBMIT THIS REQUEST:

Online at www.isba.org/cle/coordinates

Or to ISBA CLE Department, Attn: Ashley Van De Velde,
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701

Fax: (217) 525-0712 / Email: avandavelde@isba.org

WE WILL NOTIFY YOU WHEN THE EXTENSION IS COMPLETED.



Master Curriculum

- a. Curriculum Planning Information
- b. Spring 2018 Calendar

Master ISBA CLE Curriculum Calendar FY 2017-18

I. Goals:

- Improve the quality, breadth and depth of the CLE curriculum for our ISBA members
- Present the curriculum in a more balanced time frame
- Give Sections and Committees earlier notice of their program date(s)

II. Basis for Content in CLE Curriculum Calendar:

- Requested programming based on section size
- Back to Basics programs needed
- Historical program practices based on attendance and online views
- Content needed for ISBA's Online CLE catalog due to expiring programs
- Space and resource availability
- The popularity of online delivery formats (*Last year and currently, over 80% of all ISBA CLE hours are being delivered electronically online*)

III. Live Onsite Programs

Programs with a live on-site audience, (**full day** (preferred; 6 + hours) or **half day** (3.5 + hours) programs); will be **recorded** and made available in the online CLE store and scheduled as follows:

- At the **ISBA Annual Meeting**, the CLE committee will provide a CLE Curriculum Calendar with specific dates for Live Onsite programs for the upcoming Spring Semester (*Based on Requested Programming Needs and Historical Practices*)
- At the **ISBA Midyear Meeting**, the CLE committee will provide a CLE Curriculum Calendar with specific dates for Live Onsite programs for the upcoming Fall Semester (*Based on Requested Programming Needs and Historical Practices*)
- Sections or committees (other than those already listed on the Master CLE Curriculum calendar provided by the CLE Committee) may request a live on-site program that will be reviewed on an individual basis through the routine proposal process
- Proposals are still required from each section or committee for all live onsite programs

If the date provided is unworkable, the section may contact the ISBA CLE Program Coordinator to determine a different date within the assigned semester.

IV. Live Studio Webcasts and Webinars

In addition to the on-site programs, CLE Coordinators are asked to submit proposals for **live webcasts or webinars**,³ selecting from the available dates on the Master CLE Curriculum Calendar. These programs will not have an audience on-site, but will have a

³ Webcasts stream a live video feed of the speaker and must be recorded at the ISBA Chicago Regional Office; webinars are audio only and presenters can speak from any location equipped with a land-line telephone and computer. Both formats broadcast to live online viewers.

live online audience and should be 1-2 hours long. Approved programs will be recorded and made available in the online CLE store if evaluation score standards are achieved.

V. Hot Topics

Approximately one day per month will be identified as “Hot Topic” days and will be reserved for programs about recent changes in the law. The format of the program (webcast, webinar, live on-site) will be determined by the CLE Coordinator, CLE Committee and CLE department staff on an individual basis.

VI. Proposals

All program proposals will be reviewed on the following criteria:

- Program topic(s)
- Completeness and accuracy of proposal
- Demand for CLE programs
- Current programs available in the Online CLE catalog and expiration date
- Availability in CLE schedule

VII. Benefits to Having Master Curriculum Calendar

CLE Coordinators and Sections and Committees:

- Knowing the program date in advance helps to identify and schedule speakers
- Having a simplified CLE Proposal process—less back and forth with availability of space and dates
- Requirements for each section will be known well in advance of the upcoming semester
- “Hot Topic” dates will be identified and available closer to the program date
- Knowing available webcast times will help with scheduling speakers

ISBA Members:

- Well-rounded catalog of on-demand programming
- Less likely to have on-site programs canceled due to low attendance
- Advance notice of what will be offered as live on-site programs and when so they can schedule accordingly

January 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 No programs— New Year's Day	2	3	4	5	6
7	8	9 Practice Toolbox 12-1	10	11 webcast, webinar or half-day onsite	12 webcast, webinar or half-day onsite	13
14	15 Martin Luther King Jr. Day	16	17	18 webcast, webinar or half-day onsite	19 Criminal Justice full day CRO	20
21	22	23 Practice Toolbox 12-1	24 Mentoring Luncheon	25 General Practice full day CRO	26 Board Meeting CRO	27
28	29	30	31 webcast, webinar or half-day onsite			

February 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2 Ag Law full day downstate Fed Tax full day CRO	3
4	5	6	7	8	9	10
-----40 Hour Mediation CRO-----						
11	12 Lincoln's Birthday	13 Practice Toolbox 12-1	14 Ash Wednesday webcast, webinar or half-day onsite	15 Bench & Bar half-day CRO	16 Commercial Banking full day CRO (Basics?)	17
18	19 President's Day Workers' Comp full day CRO and Fairview Heights	20	21 webcast, webinar or half-day onsite	22	23 Tort Law full day CRO (Basics?)	24
25	26	28 Practice Toolbox 12-1				

March 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2 Animal Law full day CRO	3
4	5	6	7	8 UCC Master Series CRO	9 Trusts & Estates full day CRO (Back to Basics?)	10
----- 40 Hour Mediation/Arbitration Training Master Series - Pere Marquette -----						
11	12	13 Practice Toolbox 12-1	14 webcast, webinar or half-day onsite	15 Possible half-day Bloomington	16 Solo Small Firm Practice Institute Bloomington	17
18	19	20	21 webcast, webinar or half-day onsite	22 Young Lawyers full day CRO	23 General Practice Quincy Labor & Employment full day CRO (Back to Basics?)	24
25	26	27 Practice Toolbox 12-1	28	29	30 No CLE - Good Friday Passover Good Friday	31

April 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 Easter	2	3	4 webcast or webinar	5	6	7
8	9	10 Practice Toolbox 12-1	11 webcast, webinar or half-day onsite	12	13 Traffic Law suburbs full day Senior Lawyers full day CRO	14
15	16	17	18 webcast, webinar or half-day onsite	19 webcast, webinar or half-day onsite	20 Family Law full day CRO	21
22	23	24 Practice Toolbox 12-1	25	26 Elder Law CRO 2 days bootcamp	27	28
29	30					

May 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
				Environmental Law CRO 2 days		
6	7	8 Practice Toolbox 12-1	9 Federal Civil Practice full day CRO or off-site	10 Hold for Hot Topic CRO	11 Civil Practice and Procedure full day CRO	12
13	14	15	16 webcast, webinar or half-day onsite	17 Real Estate full day Lombard	18 Hold for Master Series full day CRO	19
20	21	22 Practice Toolbox 12-1	23 webcast, webinar or half-day onsite	24 webcast, webinar or half-day onsite	25 Friday before Memorial Day - no CLE	26
27	28 Memorial Day	29	30 webcast, webinar or half-day onsite	31 Possible half-day Naperville		

June 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 Solo Small Firm Naperville	2
3	4	5	6	7 webcast, webinar or half-day onsite	8 Hold for hot topic CRO	9
10	11	12 Practice Toolbox 12-1	13	14 -----Annual Meeting-----	15	16
17	18	19	20 webcast, webinar or half-day onsite	21 Hold for hot topic CRO	22 Hold for hot topic CRO	23
24	25	26 Practice Toolbox 12-1	27 webcast, webinar or half-day onsite	28 Minority Bar Conference	29	30



Proposal Submission Requirements

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

Program Formats and Proposal Deadlines

Live Onsite Programming

Live onsite at any location. Live onsite programming in the ISBA Chicago Regional Office has the option of simultaneous live webcasting.

Submission Deadlines	Presentation Dates
July 15 th	Dec./Jan
September 15 th	Feb./March
November 15 th	April/May
January 15 th	June
March 15 th	Sept.
May 15 th	Oct. /Nov.

Webcast or Webinar Presentations

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

Submission Deadlines*	Presentation Dates
July 15 th	Oct./Nov.
September 15 th	Dec./Jan.
November 15 th	Feb./March
January 15 th	April/May
March 15 th	June
May 15 th	Sept.

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



LIVE ONSITE* PROGRAM

2016-17 Program Proposal Illinois State Bar Association

**Complete proposal forms must
accompany all proposals.**

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

Submission Deadlines — Presentation Periods:

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

Form is also available at:

www.isba.org/cle/coordinators

Please Submit a **Typed** Form

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

A. Sponsoring Section Council/Standing or Special Committee: _____

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

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

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

E. Requested Program:

☐ **Live onsite program only**

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

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

☐ **Chicago Only; Date(s):** _____

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

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

G. Program Length:

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

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

☐ **Half day** *(at least 3.5 hours)*

- H. **Segment Length:** ☐ I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks.
- I. **Professional Responsibility MCLE credit, if included:** *PMCLE topics (professionalism, 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: _____*
- 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: _____

Sponsoring Section: _____

To what specific type of practitioner is this program directed?

(Identify the targeted substantive law practice areas)

To what level of practice experience is this program directed?

☐ Basic ☐ Intermediate ☐ Advanced

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

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

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

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

Speaker Recruitment

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

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

Directions for Preparing the Program Agenda and Submitting Program Proposal

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

Please attach additional pages for each segment as needed.

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

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

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

Thank you for your proposal!

COORDINATORS:

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



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



WEBCAST or WEBINAR PRESENTATIONS*

2016-17 Program Proposal Illinois State Bar Association

Complete forms must accompany all proposals.

**NO ONSITE AUDIENCE.*

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

Submission Deadlines* -- Recording Periods:

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

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

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

Please Submit a Typed Form

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

- A. **Sponsoring Section Council/Standing or Special Committee:** _____
- B. **Co-sponsoring ISBA Section Council(s) or Committee(s):** _____
- C. **Title of proposed program** (*keep it short, simple, and catchy!*): _____
- D. **Person(s) submitting proposal** (*Include name, address, telephone number, e-mail address, and section committee on which you serve*):

- E. **Requested Program Date(s)*:** _____
Please Note: Webcasts and Webinars are presented on Wednesday and Thursdays.
***If Hot Topic Expedited Date is Requested, Provide Justification** _____
- F. **Short Program Length, indicate time:** (*1-2 hours recommended*) _____
- G. ☐ **I confirm by checking this box that I have made an effort to schedule speakers for presentation times measurable in quarter-hour increments (15, 30, 45, 60), except introductory and closing remarks.**
- H. **Professional Responsibility MCLE credit, if included: PMCLE topics** (*professionalism, 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: _____

- 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

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ISBA Sections

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- ☐ Agricultural Law
- ☐ Alternative Dispute Resolution
- ☐ Animal Law
- ☐ Antitrust
- ☐ Bench & Bar
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- ☐ Corporate Law Department
- ☐ Criminal Justice
- ☐ Education Law
- ☐ Elder Law
- ☐ Employee Benefits
- ☐ Energy, Utilities, Transp. & Telecomm.
- ☐ Environmental Law
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- ☐ Federal Tax
- ☐ General Practice
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- ☐ 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 **WEBCAST or WEBINAR PRESENTATION** Program Agenda Template

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

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

Program Title: _____

Sponsoring Section: _____

To what specific type of practitioner is this program directed?

(Identify the targeted substantive law practice areas)

To what level of practice experience is this program directed?

☐ Basic ☐ Intermediate ☐ Advanced

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

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

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

Speaker Recruitment

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

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

Directions for Preparing the Program Agenda and Submitting Program Proposal

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

Please attach additional pages for each segment as needed.

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

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

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

Thank you for your proposal!

COORDINATORS:

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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
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- ☐ 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 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



Speaker Packet

- a. Sample Email to Speakers
- b. Printed Speaker Letter
- c. General Information
- d. Speaker Invitation
- e. Presentation Agreement

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

Hello ISBA Faculty,

Thank you for agreeing to present or moderate at the ISBA Law Ed Program entitled **Estate Administrative Issues: Are You Prepared to Handle Some of the Difficult Issues Facing Your Client?** scheduled to be held on **Friday, June 9, 2017** from **9:00 a.m. - 4:45 p.m.** at the **ISBA Chicago Regional Office** and as a **LIVE webcast**.

We ask that you complete and return the items identified below via email to Janean Goby at speakerinfo@isba.org by **Tuesday, May 23, 2017:**

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

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

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

- **Presentation Agreement** – Please complete and sign the attached presentation agreement. **Note: this is a new presentation agreement for 2017 and must be signed and submitted, even if you previously spoke with the ISBA in 2016.** Your presentation may be videotaped and made available after the program through the ISBA website in electronic delivery formats that will include your contact information for follow-up questions. Please contact me as soon as possible if have any questions or concerns with this agreement.
- **Biography** – Please include at a minimum your: firm name, educational degrees with dates, brief work history, and bar association memberships/activities.

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

- **Professional Responsibility Course Audit Form** – The Illinois Supreme Court Commission on Professionalism may audit this program to ensure compliance with Professional Responsibility course credit. Attached you will find the audit form used by the Commission.

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

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

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

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

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

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

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

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

Sincerely,

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

Ms. Jane Doe
1234 Street
Chicago, IL 60601

Dear Ms. Doe:

Thank you for agreeing to present or moderate at the ISBA Law Ed Program entitled **Illinois Appellate Practice: What Every Lawyer Should Know** scheduled to be held on **Friday, April 29, 2017** from **8:50 am - 4:30 pm** at the **ISBA Chicago Regional Office**.

This letter serves to follow up to an email you received on **March 3, 2017** from me at jgoby@isba.org. The message was sent to you at the email address on file with the Illinois State Bar Association: **jdoe@isba.org**. If this email address is incorrect, please contact me at jgoby@isba.org or by phone at (217) 525-1760 so I can send you the program information and update your contact information.

The email you received includes pertinent information about the program including:

- Materials deadline of **Monday, March 21, 2017**
- Required documents
 - Course Materials
 - Presentation Agreement
 - Biography
 - A/V needs
- Program agenda for your review
- General information page and links to ISBA faculty resources

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

Sincerely,

Janean Goby
Continuing Legal Education Program Coordinator
jgoby@isba.org
(217) 525-1760



GENERAL INFORMATION FOR LAW ED SPEAKERS AND MODERATORS

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

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

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

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

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

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



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

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

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

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

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

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



Commercial Loans: Documenting For Success and Preparing for Failure

Presented by the ISBA Commercial Banking, Collections and Bankruptcy Section

Co-sponsored by the ISBA Real Estate Law Section

Dear Fellow Practitioner,

I would like to personally invite you to attend ISBA's upcoming Law Ed seminar titled, "[Commercial Loans: Documenting For Success and Preparing for Failure](#)," which I will be co-presenting in **Chicago on Thursday, June 8, 2017**. For those unable to attend in Chicago, the program will also broadcast as a [live webcast](#).

This full day seminar offers you an opportunity to understand the commercial lending process, the relevant commercial loan documents, and the negotiation and documentation of their terms. Real estate lawyers or attorneys representing financial institutions at an intermediate level of practice attending this seminar will better understand: the overall commercial lending process; essential terms and common errors encountered in commercial loan documents; how to assure UCC Code compliance; ethical considerations in lender liability claims; effects of Illinois Credit Agreements Act; documents for distressed borrowers; and much more! The seminar is presented by the **ISBA Commercial Banking, Collections and Bankruptcy Section** and co-sponsored by the **ISBA Real Estate Section**. It qualifies for **6.0 hours MCLE credit**.

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

Thursday, June 8, 2017

8:50 a.m. – 4:30 p.m.

ISBA Regional Office, 20 S. Clark Street, Suite 900, Chicago

To register – www.isba.org/cle/2017/06/08/commercialloans

\$135/ISBA Members; \$290/Non-Members

Thursday, June 8, 2017

8:50 a.m. – 4:30 p.m.

Live Webcast

To register – <http://onlinecle.isba.org/store/seminar/seminar.php?seminar=93975>

\$135/ISBA Members; \$290/Non-Members

Sincerely,

(Speaker name here)



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

Applicability Dates: This Presentation Agreement applies to all written and spoken presentations ("Presentation(s)") I present for ISBA between the dates of **January 1 – December 31, 2017**.

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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 aggregate statistical purposes. ISBA will destroy and will not disclose individual presenter's responses to this optional inquiry.



ISBA's Law Ed Faculty Resources
(also at <https://isba.org/cle/faculty>)

- a. Video Resources
- b. Materials Guidelines
- c. Using PowerPoint to Present Your Lecture
- d. Options for Interactivity
- e. On-Camera Presentation Tips
- f. PMCLE Presenter Tips
- g. IL Commission on Professionalism Checklist and Tips
- h. Strategies for Teaching CLE

Short Faculty Development Video Resources

Engaging Your Audience



Using Power Point Effectively



Making Your Voice Come Alive



Using Webinar Engagement Tools Effectively



Bill Moller's Top Tips for On-Camera Presentations for ISBA Faculty

If you missed *Presenting On-Camera: Tips and Advice from a Broadcast Journalist Pro* on November 13th be sure to check out **Bill Moller's Top Tips for On-Camera Presentations for ISBA Faculty** on the video below. Bill helps you prepare for your next CLE studio presentation and on-camera courtroom appearance with his prize-worthy presentation tips – from preparing your notes and organizing your presentation, to presenting your information on-camera with comfort and ease!



For more Faculty Resources, please visit:

<http://www.isba.org/cle/faculty>

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

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

II. What Does ISBA Expect?

1. “Thorough, high quality, readable and carefully prepared written materials” (S.Ct. Rule 795(5)).
2. Original materials (preferred).
(If copyrighted materials are submitted, you must provide written permission for ISBA to use or they will not be included in the course book. ISBA cannot use Lexis and Westlaw materials.)
3. Materials sent electronically.
(Word and Power Point only; scanning hard copies produces an inferior print quality.)
4. Materials submitted by the required deadline so they are in the Law Ed course book:
* 4 weeks prior to program for MCLE topics
* 5-6 weeks prior to program for Professional Responsibility MCLE topics so that ISBA can apply to IL Supreme Ct. Commission on Professionalism for PMCLE credit
5. Supplemental Power Point slides to highlight important points, submitted in advance for inclusion in the course book.
(Do not include all of your written material in the Power Point format.)
6. Signed presentation agreement giving ISBA non-exclusive rights to reuse the presentation and materials.
(You also retain those rights as the author/presenter.)

III. Top Ten Tips for Terrific Law Ed Materials

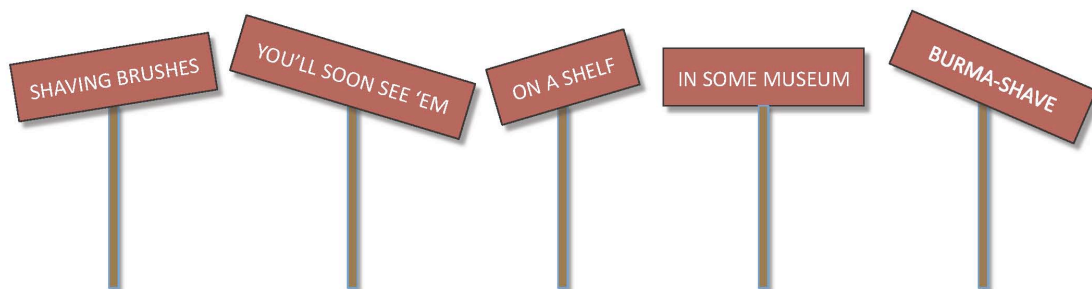
1. Establish learning objectives for your presentation and make sure the materials support your objectives.
2. Write materials that will provide a complete, independent legal resource after the program is over.
3. Stay on topic by delivering information about the topic described in the original brochure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

IV. ISBA Law Ed Formatting and Submission Requirements

1. **The ISBA CLE Editorial Staff accepts original speaker materials in MS Word and Power Point only.** Please do not submit your materials in PDF format! The only exceptions to this are court dockets, materials extracted from FastCase (or similar database research center), articles/information taken from print magazines, copies of a case or statute, etc. (In essence, things that you, the author, did not create yourself, but have secured and provided written permission for ISBA to reprint.)
2. **All original materials should be:**
 - a. Typed in Times New Roman
 - b. Typed in 12-point font
 - c. Double-spaced
 - d. Paginated (center bottom)
3. **All materials (including bios) should be submitted to the ISBA CLE Editorial Staff no later than four weeks (for general MCLE) or 5-6 weeks (for PMCLE) prior to the program date!** Every program contains a course book, and every course book must be constructed, printed, and shipped to the program location. This process takes time...which means it is imperative that you submit your materials at least four to six weeks prior to the program. Materials submitted late will not be included in the ISBA course book and will not be available to webcast viewers of live webcast programs. In these situations, it will be your responsibility, as the speaker, to copy, pay for and bring enough copies of the material to hand out to the on-site registrants. Live webcast viewers will just be left out -- to the detriment of the online viewer *and your evaluation rating*. Also, all Professional Responsibility topics must have approval of the IL Supreme Court Commission on Professionalism. This application/approval process takes 2-4 weeks and program attendees expect certainty as to PMCLE credit approval.
4. **Materials should be submitted electronically (do not convert materials to PDF format prior to submitting). If you have no other option than to use snail mail....**
 - a. Do not staple materials together. Please use a paper clip. (Should the paper clip come off, this is where the page numbers come in handy for us.)
 - b. Submitted copies should be "clean" and "camera ready"...no crooked photocopies, please!
5. **Power Point slides are meant to highlight important points!** While Power Point slide shows are a great way to engage your audience during presentations, they are not the appropriate way to present *all* of your information. Please limit the amount of information included on each slide. You should use an additional textual document to present the bulk of your materials and reference information.
6. **Please submit your bio with your materials!** Every ISBA course book contains a "biography" section, which is our way of giving credit where credit is due. Bios are a way for speakers to advertise themselves...to flaunt their accomplishments, so to speak. Bios submitted late will not be included in the ISBA course book. If you do not have a bio, please complete and return the biography form included in your speaker packet and ISBA staff will format the information for inclusion in the book.

Using Power Point to Present Your Lecture

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



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

Rule #1: Use Few Words!

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

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

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

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

Rule #2: Keep It Clear and Uncluttered!

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

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

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

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

Rule #3: Use Large Font!

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

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

This is 32-point font.
This is 20-point font.

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

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

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

Options for Interactivity in ISBA CLE Programs

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

Obstacles to Incorporating Interactivity in CLE Programs

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

How to overcome the Obstacles

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

On-Camera Presentations Tips

1. Preparation, Preparation, Preparation

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

2. Prepare for your on-camera appearance

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

3. Present with Confidence

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



Professional Responsibility MCLE Presenter Tips

1. Prepare an identifiable segment of not less than 30 minutes for presentation on professionalism, diversity issues, mental illness and addiction issues, civility or legal ethics.
2. Submit high-quality, fully developed written materials to ISBA **6 weeks** prior to the presentation so ISBA can apply to the Illinois Supreme Court Commission on Professionalism for credit approval and have sufficient time to receive approval and promote the PMCLE credit. Attendees frequently choose programs based on whether the PMCLE credit is pre-approved.
3. Submit original materials. If copyrighted materials are submitted, you must secure and provide written permission for ISBA to reprint and use them in future electronic presentations. *Westlaw and Lexis materials cannot be accepted due to copyright issues.*
4. Incorporate active learning experiences into the delivery method – such as hypotheticals or case simulations – to encourage audience interactivity.
5. Review the Illinois Supreme Court Commission on Professionalism’s Professional Responsibility Course Development Checklist prior to developing your presentation.
www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf

Professional Responsibility Course Development Checklist

This course development checklist was created for teachers of professional responsibility continuing legal education courses to help to guide course design so that it meets the CLE credit requirements.

Guiding principles:

- In professional responsibility continuing legal education, the focus is to raise the professionalism of behavior. Therefore, when developing course content, consider not what material “should be covered” but what the participants will learn to do, e.g., “As a result of this participating in this course, the lawyer will be able to...”
- In addition, provide active learning experiences in which participants apply knowledge or practice skills in furtherance of the learning objectives because active learning delivery methods, such as hypotheticals or case simulations, are significantly more effective than lecture.

Minimum criteria for professional responsibility credit:

- The professional responsibility course or activity has significant intellectual, educational, or practical content with a primary objective to increase each participant’s competence as an attorney.
- The professional responsibility course or activity relates primarily to the practice of law.
- The substance of the professional responsibility course or activity is one or more of the following: professionalism, diversity, mental illness and addiction issues (wellness), civility, and legal ethics.

Note: To illustrate the above, a diversity/professionalism course on generational issues will not be approved unless the course focus is on the lawyer’s understanding and competency, e.g., to prevent incivility, miscommunications, and misconceptions across generations in the practice of law; be that lawyer to lawyer, lawyer to client, lawyer to judge.

Reminders for completing online application:

- *Learning objectives* describe why the course is being offered and explicitly show how the course relates one or more of the five categories of the professional responsibility CLE rule and the practice of law, g., “To increase the lawyer’s understanding of situations that present conflicts of interest; to

strengthen the lawyer's ability to act to avoid these conflicts by considering the nuances of Rule 1.7 in the context of representing corporate clients."

- Faculty are qualified by education and experience to provide effective learning experiences for lawyers.
- Each credit hour is based on 60 minutes; partial credit hours are rounded down to nearest quarter hour; and credit hours do not include breaks, introductory and closing remarks, keynote speeches or business meetings. A course shall include at least one-half hour of instruction.
- Written resource materials that support the course learning are provided to participants before or at the course.
- Faculty are available to participants when the course is not offered with faculty in room with participants. This may include participant phone access to qualified faculty; email or chat access to qualified faculty; or other faculty interaction access.

Strategies for Teaching CLE

The Commission on Professionalism has developed forms, checklists and curated strategies for teaching CLE to assist providers and course facilitators with designing the learning experience.

Ten Tips for Facilitating Discussion
Seven Tips: Delivering a Great Attendee Experience
The Art of Effective Teaching
What Attorneys Want in a CLE
Avoiding the Talking Head: How to Keep Your Learners Engaged
How Adults Learn – Emphasizing the “E” in CLE
What is the Flipped Classroom?
Adult Learning Techniques (including facilitating v. lecturing)
Professional Responsibility CLE Course Development Checklist
Professional Responsibility CLE Participant Evaluation Form

Available at: <https://www.2civility.org/programs/cle/cle-resources/strategies-for-teaching-cle/>