



CLE Coordinator Playbook for Program Planning

July 2021

Your CLE Adventure Tour



ISBA LawEd: The best CLE to enhance the professional competence of ISBA members.

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ISBA CLE Coordinator – Volunteer Position Description

SUMMARY OF RESPONSIBILITIES

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

PRIMARY RESPONSIBILITIES

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

Coordinating an ISBA Law Ed Program

By coordinating a CLE program, you will . . .

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

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



Section & Committee Annual CLE Programming Expectations – FY 2021-22
Requested Minimum Number of CLE Hours to be Produced for On-Demand Catalog

Sections

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

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

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

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

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

Committees

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

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

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

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

SECTION COUNTS - 4/30/2021

(Based on active due paying membership)

<u>Section Name</u>	<u>Active</u>
Administrative Law	164
Alternative Dispute Resoltn	204
Agricultural Law	228
Animal Law	84
Bench & Bar	194
Bus. Adv. & Fin. Plnng	313
Business & Securities	465
Cannabis Law (Complementary Membership At This Time)	731
Child Law	227
Civil Practice	1,520
Commercial Banking	536
Construction Law	232
Corporate Law Dept.	300
Criminal Justice	742
Education Law	172
Elder Law	523
Employee Benefits	122
Energy, Utilities, Transportation & Telecommunications	82
Environmental Law	177
Family Law	1,546
Federal Civil Practice	256
Federal Tax	291
Food Law (Complementary Membership Through 6/30/21)	179
General Practice	560
Health Care	305
Human Rights	95
Insurance Law	372
Intellectual Property	289
International Law	182
Labor & Employment	692
Law Office Management and Economics	197
Legal Technology	210
Local Government	396
Mental Health Law	103
Mineral Law	52
Privacy & Information Security Law	240
Real Estate	1,718
Senior Lawyers (Complimentary Membership Only)	8,453
State & Local Tax	283
Tort Law	944
Traffic Laws & Courts	440
Trusts & Estates	1,786
Workers' Compensation	578
Young Lawyers Division (Complementary Membership Only)	8,675



2021-2022 Deadlines

CLE Proposal Deadlines

CLE programs and speakers should be confirmed four to six months prior to the event, unless it is a hot topic that can be presented more quickly. In the FY21-22 term, please plan programs that will occur between December of 2021 and November of 2022. The proposal form is available at <http://www.isba.org/cle/coordinators>.

Live Onsite Programs

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

Webcast or Webinar Presentations

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

ISBA CLE COMMITTEE

Long Range Planning

Goals and Objectives

August 2018 Updated August 2019, November 2019, December 2019

<p><u>ISBA CLE Mission</u></p> <p>ISBA Law Ed will provide the best CLE to enhance the professional competence of ISBA members.</p>
<p><u>ISBA CLE Goals - 2018 - 2022</u></p> <ol style="list-style-type: none"> 1. Increase and retain ISBA membership through CLE 2. Focus on Online CLE catalog content to better serve our primary member CLE audience (online) and better use ISBA’s limited resources through a planned curriculum that defines and generates the necessary core content, with special emphasis on new attorney content 3. Improve quality of all programs—substance, speakers, materials and delivery—especially online CLE programming and user experiences

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

<p><u>Highly Important Next Steps to Achieve ISBA CLE Goals</u> <u>With Subcommittee Assignments</u></p>	
Highly Important Next Steps To Achieve ISBA Goals	Focus Group
Explore the idea of an ISBA CLE program attorney position	Programming Subcommittee
Explore certification programs	Programming Subcommittee

<u>Staff Driven Projects</u>
Explore Procertus Programming



Top 50 Online CLE Programs

April 2020 – April 2021

(Ranked by total number of orders & First 10 programs COVID-19 Free CLE programs)

1. Diversity and Inclusion: Increasing Diversity within the Legal Profession (**ISBA**)
2. Resiliency for Lawyers: Strength Under Stress (**Expired - Health & Wellness**)
3. Ethics for the General Practitioner (**Expired - General Practice**)
4. Legal Cannabis and the Workplace (**Labor & Employment**)
5. Preparing Your Witness For the Deposition (**Civil Practice & Procedure & YLD**)
6. Internet Advertising, Marketing, and Website (**Expired - General Practice**)
7. Civil Appeal Basics: Handling an Appeal in the Illinois Appellate Court (**Civil Practice & Procedure**)
8. E-Filing: How to File Properly While Meeting Privacy Obligations (**Bench & Bar**)
9. Using Social Media to Maximize Recognition and Revenue for Your Firm (**SSFPI**)
10. Risk Management in an Estate Planning Practice - Practice Ready Series (**Practice Ready Series**)
11. 60 Tips in 60 Minutes (**Expired - Legal Technology**)
12. Diversity and Inclusion: Professionalism at Work in the Law (**ISBA & IJA**)
13. ISBA Basic Skills for Newly Admitted Attorneys – 2018 (**ISBA**)
14. 2020 Traffic Case Law and Legislative Update (**Traffic**)
15. Unconscious Bias: The Impact on the Legal Profession and the Justice System (**Expired - Environmental**)
16. 15 Hour Solo Small Firm Bundle – 2019 (**SSFC**)
17. Civil Practice Update Fall 2019 - Part 1 (**Civil Practice & Procedure**)
18. Collections for Non-Collections Attorneys (**Banking, Collections & Bankruptcy**)
19. 60 Legal Tech Tips, Tricks, Gadgets and Websites in 60 Minutes (**Expired - Practice Toolbox**)
20. 8 Things Killing Your Law Firm - And How to Stop Them (**Expired - Practice Toolbox**)
21. Civility and Professionalism 2019: Properly Handling Emerging Issues with Competence (**Bench & Bar**)
22. Ethics and the Settlement Process (**Labor & Employment**)
23. Civil Practice and Procedure Update: Pleadings, Motions, Discovery, and Resolving Cases through Settlement and Mediation (**Expired - Civil Practice & Procedure**)
24. Cannabis 101: Advising Your Illinois Clients on the Cannabis Industry (**Master Series**)
25. Mindfulness for Lawyers (**SSFC**)
26. Business Continuity for Law Offices in the Face of Coronavirus (**ISBA**)
27. Mediation: Bridging the Chasm (**Labor & Employment**)
28. Diversity in the Judiciary (**Expired - Minority Bar CLE**)
29. Remote Hearings 101: Coming Soon to a Courtroom Near You (**ISBA**)
30. 8 Things Every Trial Lawyer Should Know (**Tort**)
31. Estate Planning Update – 2019 (**Expired - General Practice**)
32. And the Hits Just Keep Coming: State, Local, and Property Taxes in the 2020s (**State & Local Tax**)
33. Hamilton: An American Lawyer - Lessons for Your Law Practice (**Expired - ISBA**)
34. Intervention: The Struggling Attorney (**Bench & Bar**)

35. Employment Claims Arising Out of a COVID-19 Pandemic and Remedy Buffet for Civil Rights Cases (**Human Rights**)
36. Mindful Combat (**Expired - Environmental**)
37. Advising Clients in the COVID Era (**Business Advice & Financial Planning**)
38. Document Management and Retention: Can I Throw It Away Yet? (**Practice Toolbox**)
39. Advice from the Bench (**Expired - General Practice**)
40. Commercial Real Estate Transactions - The Basics (**Expired - Real Estate**)
41. Blockchain 101: Technical Concepts, Legal and Business Issues (**Expired – Civil Practice & Procedure**)
42. Expert Witnesses: Find Them, Prep Them, Challenge Them (**Expired – Tort**)
43. Civil Practice Update Fall 2019 - Part 2 (**Expired – Civil Practice & Procedure**)
44. Bankruptcy and Divorce (**Expired – Commercial Banking, Collections, and Bankruptcy**)
45. ADR 2019: Using Alternative Dispute Resolution to Navigate Rights - Part 1 (**Expired - Alternative Dispute Resolution**)
46. Work-Life Balance: Is It Possible? (**ISBA & IJA**)
47. Access Your Documents from Anywhere and Safely Share Them with Others (**ISBA**)
48. Brush Up on Social Security: Recent Regulatory and Procedural Changes in Social Security Disability Law (**Disability Law**)
49. Litigating in an E-World: E-Discovery, Forensics, and Open Source Intelligence in Research (**Labor & Employment**)
50. The Hot Seat: Taking and Defending Depositions (**Expired - Practice Ready Series**)

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

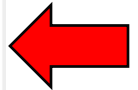
OPTION 1:

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

CLE Program Planning Requirements and Resources

Coordinator Planning Information

- Check your **section's or committee's current Online CLE programs** to identify and plan for missing topics in your next program.
- [CLE Coordinator Handbook](#)
- [Checklist for CLE Coordinators](#)
- [Example Agendas](#)



2. Select your group from the list of sections and committees at www.isba.org/cle/coordinators/programs and view current available content sponsored by that section or committee. If a section or committee doesn't appear then there are no current programs.



Committees

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

Sections

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

OPTION 2:

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



Filter Programs By:

Title:

Topic: Practice Ready Basics

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

Closed Captioned

Trending Topics

- Law Office Management
- Legal Technology
- New Lawyers
- Basic Skills for New Attorneys
- On-Camera Speaker Tips

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

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

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



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

Program Title:

Sponsoring Section or Committee:

CLE Coordinator Making the Request:

Expiration Date Listed in ISBA Online CLE Catalog:

(typically two years from original recording date)

New Expiration Date Requested:

(up to two years from current expiration date)

Date Submitted:

SUBMIT THIS REQUEST:

To the ISBA CLE Department, Attn: Tara Sanders
Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
Fax: (217) 525-0712 / Email: tsanders@isba.org

WE WILL NOTIFY YOU WHEN THE EXTENSION IS COMPLETED.



WEBCAST OR WEBINAR PRESENTATIONS

Submission Deadlines – Presentation Periods:

7/15	October/November
9/15	December/January
11/15	February/March
1/15	April/May
3/15	June
5/15	September

Complete proposal 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.

Form is also available at: www.isba.org/cle/coordinators | Please submit a **typed** form

Please complete the following template and proposal information, adjusting as necessary.

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

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

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

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

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

If Hot Topic Expedited Date Requested, Provide Justification _____

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

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

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

G. Topics Covered: _____

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

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

I. Practice Level Targeted: Basic Intermediate Advanced

Program Coordinator(s):

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

Program Moderator(s):

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

Topic 1, 2, 3, etc.

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

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

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

Additional Information

- A. (optional) I Request ISBA’s assistance in setting up a **pre-program teleconference** with all panelists/speakers.
- B. **Publications (optional):** To help with program promotion, please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process. _____

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

ISBA Sections

- Administrative Law
- Agricultural Law
- Alternative Dispute Resolution
- Animal Law
- Bench & Bar
- Business Advice & Financial Planning
- Cannabis
- Child Law
- Civil Practice
- Commercial Banking, Collections & Bankruptcy
- Construction Law
- Corporation Securities & Business
- Corporate Law Department
- Criminal Justice
- Education Law
- Elder Law
- Employee Benefits
- Energy, Utilities, Transp. & Telecomm.
- Environmental Law
- Family Law
- Federal Civil Practice
- Federal Tax
- Food Law
- General Practice/Solo & Small Firm
- Health Care
- Human Rights
- Insurance Law
- Intellectual Property
- International & Immigration Law

- Labor & Employment
- Local Government
- Mental Health Law
- Mineral Law
- Privacy & Security Law
- Real Estate
- Senior Lawyers
- State & Local Tax
- Tort Law
- Traffic Laws & Courts
- Trusts & Estates
- Workers' Compensation
- Young Lawyers

ISBA Committees

- ARDC
- Corrections and Sentencing
- Delivery of Legal Services
- Disability Law
- Government Lawyers
- Law Office Management & Economics
- Legal Technology
- Military Affairs
- Racial and Ethnic Minorities
- Sexual Orientation and Gender Identity
- Women and the Law
- Other _____
- Certified Public Accountants* (*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)**

Additional Steps

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

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

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

Thank you for your proposal!

CHECKLIST FOR CLE COORDINATORS

Program Composition

Did you...

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

Presenter Recruitment

Did you...

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

Presenter Support

Did you...

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

Moderator Selection

Did you...

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

Proposal Submission

Did you...

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

Communicating with Presenters For a Better Program

Did you...

- schedule a telephone conference 7 - 8 weeks prior to the program for all presenters, the moderator and yourself to confirm topics, reinforce materials deadlines, and address questions? (Contact ISBA if you would like ISBA assistance in providing you with telephone conference capabilities.)

LAW ED PRESENTER INFORMATION

THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

What You can Expect:

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

What ISBA Expects:

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



WEBCAST OR WEBINAR PRESENTATIONS

Submission Deadlines – Presentation Periods:

7/15	October/November
9/15	December/January
11/15	February/March
1/15	April/May
3/15	June
5/15	September

Complete proposal 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.

Form is also available at: www.isba.org/cle/coordinators | Please submit a **typed** form

Please complete the following template and proposal information, adjusting as necessary.

A. Proposed Program Title (*keep it short, simple and catchy!*) Post Covid 19 Construction Contract Clauses

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

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

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

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

If Hot Topic Expedited Date Requested, Provide Justification Covid 19 cutting edge webinar

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

1 hour(s) MCLE credit, including 0hour(s) Professional Responsibility MCLE credit in the following category(ies) (*PMCLE not required, but if offered, must be a minimum of one hour for full day programs and a minimum of one-half hour for half day programs*):

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

G. Topics Covered: Construction contract clauses for Covid 19

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

- Learning objective 1 Construction problems from Covid 19
- Learning objective 2 Cases asking for additional time or price
- Learning objective 3 Possible clauses and how they deal with the problem issues
- Learning objective 4 Cost plus fee contracts? Increased contingency and time?
- Learning objective 5 Owner, contractor and lender positions
- Learning objective 6 Application to future problems . . (add more as needed)

I. Practice Level Targeted: Basic Intermediate Advanced

Program Coordinator(s):

Paul Peterson

ABC Law Firm

City, State, Zip

123-456-7890

email@email.com

Adam Whiteman
ABC Law Firm
City, State, Zip
123-456-7890
email@email.com

Program Moderator(s):

Ehren Fournier
ABC Law Firm
City, State, Zip
123-456-7890
email@email.com

Topic 1, 2, 3, etc.

Description (2-3 sentences if not covered in above description) A discussion of the problems on a construction project caused by Covid 19, possible clauses dealing with those problems and a panel discussion of those clauses by attorneys representing owners, lenders and contractors.

Program Speaker(s):

James Dash
ABC Law Firm
City, State, Zip
123-456-7890
email@email.com

Margery Newman
ABC Law Firm
City, State, Zip
123-456-7890
email@email.com

Alexandra Cole
ABC Law Firm
City, State, Zip
123-456-7890
email@email.com

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

Additional Information

- A. (optional) I Request ISBA's assistance in setting up a **pre-program teleconference** with all panelists/speakers.
- B. **Publications (optional):** To help with program promotion, please identify one or more authors to write on program topics for an *Illinois Bar Journal*, newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process. _____

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

ISBA Sections

- Administrative Law
- Agricultural Law
- Alternative Dispute Resolution
- Animal Law
- Bench & Bar
- Business Advice & Financial Planning
- Cannabis
- Child Law
- Civil Practice
- Commercial Banking, Collections & Bankruptcy
- Construction Law
- Corporation Securities & Business
- Corporate Law Department
- Criminal Justice
- Education Law
- Elder Law
- Employee Benefits
- Energy, Utilities, Transp. & Telecomm.
- Environmental Law
- Family Law
- Federal Civil Practice
- Federal Tax
- Food Law
- General Practice/Solo & Small Firm
- Health Care
- Human Rights
- Insurance Law
- Intellectual Property
- International & Immigration Law

- Labor & Employment
- Local Government
- Mental Health Law
- Mineral Law
- Privacy & Security Law
- Real Estate
- Senior Lawyers
- State & Local Tax
- Tort Law
- Traffic Laws & Courts
- Trusts & Estates
- Workers' Compensation
- Young Lawyers

ISBA Committees

- ARDC
- Corrections and Sentencing
- Delivery of Legal Services
- Disability Law
- Government Lawyers
- Law Office Management & Economics
- Legal Technology
- Military Affairs
- Racial and Ethnic Minorities
- Sexual Orientation and Gender Identity
- Women and the Law
- Other _____
- Certified Public Accountants* (*ISBA is approved as a registered public accountant continuing professional education (CPE) sponsor.)**

ISBA Guidelines for Future Live Onsite CLE Pilot for 2022 Programs

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

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

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

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

1. Networking is offered.
2. Interactivity is included (*e.g.*, table clinics, polling, breakout sessions, etc.).
3. New attorneys in their first 5 years of practice (*i.e.*, who can attend for free) will be matched with a mentor for the day.
4. At least one new attorney speaker and/or one diverse speaker is included in the faculty.
5. A luncheon or reception is provided by a sponsor to be identified by the group submitting the proposal.
6. Rather than offering a live webcast of the program, selected speakers will be available after the event to record their topics for the on-demand catalog.

B. Eligibility: If the justification above is provided and deemed to have been met as determined by the Director of CLE in consultation with the ISBA CLE Committee, the following programs are eligible for live onsite CLE in 2022, if health and safety concerns are not an issue.

1. Joint ISBA Section/Committee CLE Programs:
 - a. Co-sponsored live onsite CLE programs.
 - b. Concurrent CLE events by multiple sections/committees.

2. One program annually by each of the six ISBA Sections with the largest section-dues-paying membership because of the greater pool of potential live onsite attendees. Attendance of 50 or more will qualify these programs to repeat in subsequent years. As of April 2021, the qualifying sections are:
 - a) *Trusts and Estates*
 - b) *Real Estate*
 - c) *Family Law*
 - d) *Civil Practice*
 - e) *Tort Law*
 - f) *Criminal Justice*
3. Historically successful live onsite CLE programs. Attendance of 50 or more will qualify a live onsite program to be repeated in subsequent years. Qualifying programs currently include:
 - c. Agricultural Law (next will be 27th annual)
 - d. Environmental Law (next will be 20th annual)
 - e. Animal Law (next will be 12th annual)
 - f. Annual Abraham Lincoln's Legacy CLE – (next will be 4th annual)
 - g. Traffic Law Updates
 - h. Bench and Bar Civility CLE
 - i. Workers' Compensation
 - j. Guardian Ad Litem programs
 - k. Minority Bar Joint CLE
4. CLE programs at ISBA Annual and Midyear Meetings.
5. Skills programs: Trial Techniques and 40 Hour Mediation.
6. Select Master Series programs.
7. Destination CLE programs, with a maximum of one per bar year for ISBA, if proposed and approved one year in advance, in accordance with ISBA's policy.
8. Other programs may be eligible, if rationale is presented and approved by the Director of CLE in consultation with the CLE Committee.

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

**Resources for Building a Diverse and Inclusive Law Ed Faculty:
Identifying Speakers with Disabilities**
Provided by the ISBA Disability Law Section

Disability Rights Bar Association

<http://disabilityrights-law.org/>

National Association of Blind Lawyers

<http://www.blindlawyers.net/>

Deaf and Hard of Hearing Bar Association

<http://www.deafbar.org/>

ABA Commission on Disability Rights

<https://www.americanbar.org/groups/diversity/disabilityrights/>

ISBA LAW ED FACULTY Join Us!



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

WE MAKE IT EASY TO GET INVOLVED!

Get started with any of the following options:

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

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

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.

FY 21-22 Coordinators & Liaisons

as of 7/21/2021

Section / Committee	Section / Committee CLE Coordinator	CLE Committee Member Liaison
Administrative Law		Anita DeCarlo
Agricultural Law	Andrew White	
Alternative Dispute Resolution	Missy Greathouse	Kelly Garrett Hicks
Animal Law	Jane McBride	Lisa Nyuli
Bench & Bar	Mike Chmiel	Tim Storm
Bus. Adv. & Fin. Planning	Candice Kline	John Johnston
	Alan Kaplan	
Business & Securites Law	Bill Price	Mary Petruchius
	Colin Clark	
	Nikhil Mehta	
	Ahad Syed	
Cannabis Law		Nancy Easum
Child Law	Josette Allen	Pam Kuzniar
<i>Civil Practice & Procedure</i>		<i>Tim Storm</i>
Commercial Banking	Samuel Levine	Paul Osborn
Construction Law	Paul Peterson	Kelly Garrett Hicks
	Adam Whiteman	
<i>Criminal Justice</i>	<i>Anisa Jordon</i>	<i>Jean Wenger</i>
Education Law	Robert Lyons	Carol Casey
Elder Law		Heather McPherson
Employee Benefits	Wesley Covert	Hon. Martin Siemer
EUTT		Ryan Gammelgard
Environmental Law	Jane McBride	
<i>Family Law</i>	<i>Pamela Kuzniar</i>	<i>Pam Kuzniar</i>
Federal Civil Practice	Janaan Hashim	
Federal Tax	Kristen Henry	Hon. Carey Gill
Food Law	Jonathon Carlson	Tim Storm
General Practice		Kelli Gordon
Health Care		John Johnston
Human Rights	Jill Leka	Mary Petruchius
Insurance Law		Ryan Gammelgard
Intellectual Property	Peggy Herrmann	
International & Immigration	Angela Peters	Jean Wenger
Labor & Employment	Alan Kaplan	Hon. Martin Siemer
Local Government		Eric Evans
Mental Health Law	Barbara Goeben	Carol Casey
	Veronique Baker	
Mineral Law	Laura Harmon	Kelli Gordon
Privacy & Information Security Law		Tim Storm
<i>Real Estate</i>		<i>Hon. Carey Gill</i>
Senior Lawyers	Eugenia Hunter	Paul Osborn
State & Local Tax	Sam Breslow	Paul Osborn
	David Kupiec	
<i>Tort Law</i>	<i>Ashley Murray</i>	<i>Anita DeCarlo</i>
Traffic Laws & Courts	J. Brick Van Der Snick	

<i>Trusts & Estates</i>	<i>Dan Felix</i>	<i>Elizabeth Khalil</i>
Workers' Compensation	Cameron Clark	Anita DeCarlo
Young Lawyers	Karen VanderMeer Bruno Marasso Greg Jones Rebecca Hausman	
ARDC		Roy Dent
Corrections & Sentencing	Kristine Honiotes	
Delivery of Legal Services	Phil Milsk	Mary Petruchius
	Wendy Vaughn	
Disability Law		Lisa Nyuli
Government Lawyers	Karen Diamond	Carol Casey
LOME	John Olmstead	Nancy Easum
	Dan Breen	
Legal Technology	Aaron Brooks	Elizabeth Khalil
Military Affairs		Kelli Gordon
REM		Pam Kuzniar
SOGI	Jennifer Shaw	Annemarie Kill
Women and the Law		Annemarie Kill

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

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

- Maintaining an on-demand CLE catalog of relevant content for members
- Prioritizing member preference for electronic formats of CLE consumption
- Developing new faculty members
- Programming regarding emerging and “hot” topics

Memorandum

To: ISBA Section and Committee Chairs and CLE Coordinators

From: ISBA CLE Committee and Staff

Date: July 2021

Re: FY 20-21 CLE REPORT

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

1. Your Section's CLE Program History Since 2013¹
2. CLE Hours Requested To Be Produced for FY 20-21 and FY 21-22
3. Number of Active Dues Paying Section Members
4. Program Evaluation Summary for FY20-21 Programs (if any)
5. Future Programming Guidance
 - a. Request to Review Online CLE Catalog Programs with How-To Tips
 - b. Online CLE Accreditation Extension Request Form
 - c. ISBA's Top 50 Online CLE Topics – April 2020 – April 2021
 - d. ISBA's 10 Hours Free Pandemic Program Stats – March 20, 2020 – May 12, 2020
 - e. Program Proposal Forms Available Online – www.isba.org/cle/coordinators

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

Overview of ISBA CLE Process with CLE Staff
The Journey of Live Web Program
From Proposal through Posting in On-Demand Catalog
(over 180 webcast titles in 2020-21)

Key:

CE- Copywriter Editor (Staci)

PC- Program Coordinator (Tara)

RC- Registration and Administrative Coordinator (Kyla)

AA- Administrative Assistant (Skylar)

CAT- CLE On-Demand Catalog (Vacant)

VP – Video Producer (Drew)

Program Proposal
(3– 4 Months Prior to Program)

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

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

Add approved title to all 4 ISBA calendars

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

PC schedules faculty call if requested

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

**CE drafts working copy of brochure working
with coordinator
(2-3 months prior)**

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

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

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

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

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

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

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

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

PC – work with financial contributors, if any

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

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

Program

VP and PC staff most webcast programs

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

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

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

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

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

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

ISBA Law Ed Program Promotions

ISBA Website

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

Printed Brochure

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

Broadcast Email

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

Program Flyer

For programs that do not have a live onsite audience, such as short webcasts and webinars, a one-page, color flyer is created and emailed to program coordinators, moderators, and speakers with the request that they distribute. These flyers are sometimes mailed to ISBA members in the target audience.

Illinois Bar Journal

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

ISBA Blog

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

Section and Committee Newsletters

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

E-Clips

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

Speaker Invitation

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



A sample speaker invitation can be found in the coordinator handbook.

ISBA Law Ed EVALUATION

[title of program]

Presented by the ISBA [sponsoring section(s)]

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

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

Yes

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

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

3.   **Moderator(s):**



Please select response below: 1=poor, 3=okay, 5=excellent

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

4.   **Segment Title**

Please select response below: 1=poor, 3=okay, 5=excellent

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

11.   What did you like best about this course?



12.   Any comments, recommended changes, or additions?

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



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

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

15.   Any comments or suggestions on the online viewing experience?

16.   After the COVID 19-restrictions have ended, if you could choose, how would you prefer to attend future CLE programs like this one? (choose one)

- Live Onsite
- Virtually via the Online Platform

17.   Comments on the CLE format? Or CLE delivery format?

Example Law Ed Speaker Packet
Cover Email

From: Tara Sanders
Sent: Thursday, July 8, 2021 1:09 PM
To: ISBA Law Ed Faculty Member
Subject: ISBA T&E Law Ed Program Tuesday, October 12, 2021 Speaker Info and Tuesday, September 21, 2021 Materials Deadline
Importance: High

Hello ISBA Faculty,

Thank you for agreeing to present or moderate your CLE program for the ISBA from your home or office. Your program entitled _____ scheduled to be held on **Tuesday, October 12, 2021** from **2:00pm-3:30pm (CST)** via **Webcast**.

ISBA's new remote presentation format will allow you to present via video while sharing your Power Point slides through the Zoom meeting platform. We will schedule a training session prior to the program. **Please let me know if you are NOT available to train on Friday, 10/8/21 from 1:30pm to 2:00pm (CST).** The calendar invitation and login information for your training session will be sent soon. Please watch this Faculty Training Video prior to our training session. <https://www.youtube.com/watch?v=teMdeH1XLM4&feature=youtu.be>

We ask that you complete and return the items identified below via email to the ISBA CLE Program Coordinator at speakerinfo@isba.org by **Tuesday, September 21, 2021:**

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

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

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

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

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

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

- Registration
- Faculty resources

We encourage you to review the **attached document: “Prepare For Your ISBA Recording”** and 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 (TITLE) _____ and thank you in advance for your timely efforts in preparing and submitting written materials in compliance with MCLE rule requirements.

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

Sincerely,

Tara Sanders | CLE Program Coordinator

Illinois State Bar Association

217-747-1421

800.252.8908 Ext. 1421

Fax: 217.525.0712

tsanders@isba.org

www.isba.org

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

Registration: Complimentary registration is automatically provided to all speakers and one moderator.

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

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

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

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

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

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

Example of Template for Speakers to Use for Personal Invitations



Building Virtual Bridges, Remote Mediation of a Construction Dispute

Presented by the ISBA Construction Law Section

Co-Sponsored by the ISBA Real Estate Law Section, ISBA Alternative Dispute Resolution, ISBA General Practice Section, and the ISBA Commercial Banking, Collections, and Bankruptcy Section

Dear Fellow Practitioner,

I would like to personally invite you to attend ISBA's upcoming Law Ed seminar titled, "[Building Virtual Bridges, Remote Mediation of a construction Dispute](#)," which I will be co-presenting via the Internet on **Wednesday, March 3, 2021**.

Learn how to handle your next construction law mediation case with this informative online program. Real estate attorneys, construction law council, civil practice lawyers, and general practitioners with all levels of practice experience who attend this program will better understand: the differences between remote and in-person mediation; the advantages and disadvantages of mediating remotely; how to prepare for your next virtual mediation; how to draft a mediation submission; and how to successfully handle an online mediation. The seminar is presented by the **ISBA Construction Law Section** and co-sponsored by the **ISBA Real Estate Law Section, ISBA Alternative Dispute Resolution, ISBA General Practice Section, and the ISBA Commercial Banking, Collections, and Bankruptcy Section**. It qualifies for **1.0 hour MCLE credit, including 1.0 hour Professional Responsibility MCLE credit** (*subject to approval*).

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

Wednesday, March 3, 2021

12:00 – 1:00 p.m.

Live Webcast

[Register Here.](#)

\$30/Members; \$50/Non-Members

Sincerely,

(Speaker name here)

PREPARE *for* YOUR ISBA RECORDING



TIPS FOR SHOOTING BETTER VIDEO

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

TIPS FOR CHOOSING YOUR ATTIRE

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



PRESENTATION AGREEMENT
Illinois State Bar Association
424 S. Second St., Springfield, IL 62701
E-mail: speakerinfo@isba.org

Applicability Dates: This Presentation Agreement applies to all written and spoken presentations (“Presentation(s)”) I present for ISBA between the dates of **January 1–December 31, 2021**.

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

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

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

Presenter’s Signature: _____ **Date:** _____

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

*Name (print): _____

Firm Name/Employer: _____

* Mailing Address: _____

* City _____ State _____ Zip _____

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

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

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



Law Ed Presenter Information

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

Short Faculty Development Videos



ISBA Faculty Zoom Training

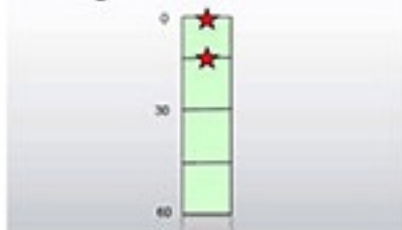
Tips for creating a smooth CLE presentation on Zoom.



The Top Tips to Deliver a Fantastic Virtual Presentation

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

Create Opportunities to Interact Throughout Your Presentation



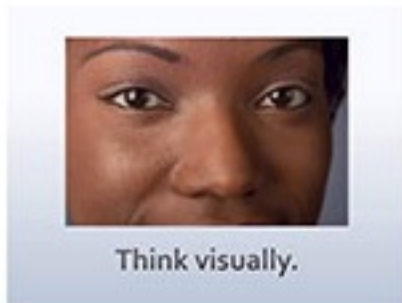
Engaging Your Audience

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



Making Your Voice Come Alive

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



Think visually.

Using Power Point Effectively

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



Using Webinar Engagement Tools Effectively

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

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.

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

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

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

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

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

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

ISBA Pricing Policy on CLE for a Legal Services Attorney

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

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

CLE Program Pricing Policy for Special Pricing Requests

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

(1)The course or activity must have significant intellectual, educational or practical content, and its primary objective must be to increase each participant's professional competence as an attorney.

(2) The course or activity must deal primarily with matters related to the practice of law.

S. Ct. Rule 795 (a)(1) and (2)

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

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

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

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

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

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

Approved by CLE committee-June 2016

ISBA Law Ed
Destination CLE Guidelines

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

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

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

- A.** A Destination CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee one year in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if target numbers are not met. The request must include:
 - 1. Program Date
 - 2. Identification of any potentially conflicting events
 - 3. Preferred Location
 - 4. Number of MCLE Hours to be offered
 - 5. Number of Speakers to be Invited
 - 6. Identification of potential financial supporters
- B.** A Complete and Final Destination CLE Program Proposal must be submitted to the ISBA CLE committee nine months in advance of the program using standard Law Ed proposal forms and must identify confirmed financial supporters and amount pledged, program and topic descriptions, confirmed speakers, and other standard proposal information.
- C.** Only programs designed to break even or better on costs (based on ISBA CLE Committee revenue/expense estimates) will be offered. Target registration numbers will be established by set dates to determine if the program will meet this goal or if the program will be cancelled.
- D.** Master Series Speakers in the vicinity of the destination program are encouraged to reduce reimbursement expenses.
- E.** If volunteer speakers are used, they must be ISBA members, unless affiliated with the financial supporters.
- F.** Destination CLE reimbursements for speakers and moderators shall comply with current ISBA Law Ed speaker reimbursement policies for in-state Law Ed programs.
- G.** A section or committee may propose a destination CLE program no more than once during an ISBA fiscal year from July 1 – June 30

- H.** ISBA will be the contracting party and will review and approve the hotel contract for the Destination CLE to ensure the ISBA is properly protected and that the terms are appropriate and reasonably consistent with other ISBA hotel contracts.
- I.** The program will comply with MCLE Board Accredited Provider standards.
- J.** Financial supporters of ISBA Destination CLE shall sign a Letter of Understanding drafted by the ISBA and documenting the obligations of the supporter. Issues that shall be addressed in the Letter of Understanding include, but are not limited to:
1. Speaker reimbursement terms
 2. Hotel expense responsibilities
 3. Acknowledgments that any financial supporter materials provided for the Law Ed course book will be in accordance with ISBA copyright permission requirements
 4. Trademark uses
 5. Rejection of joint venture or agency status
 6. Agreement that the financial supporter's presentation at the Law Ed program, if any, will not be merely a sales pitch
 7. Agreement that the financial supporter will not misrepresent its arrangement with ISBA in any future marketing to Illinois lawyers
 8. Designation of responsibilities for books, MCLE credit tracking, etc.
 9. Financial supporter use of or references to the ISBA name in advertising or other financial supporter materials
 10. Various other standard contract terms
- K.** Third-Party Financial Supporters
1. Agreements with third-party financial supporters shall be consistent with other contracts held by the ISBA.
 2. Opportunities for financial supporters:
 - a. Exhibitor opportunities at the CLE event
 - b. Opportunities to collect business cards/contact information from attendees
 - c. Speaking opportunities at the event, if:
 - The topics are creditable as MCLE
 - The speaker does not market the product during the presentation
 3. Financial supporters may not represent that their financial support of an ISBA event is an endorsement by ISBA of their products or services

Adopted by CLE committee October 2011.Revised May 2014

ISBA Law Ed
Financial Contributor Subsidized CLE Guidelines

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

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

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

- A.** A Financial Contributor Subsidized CLE Request for Preliminary Approval must be submitted to the ISBA CLE committee nine months in advance of the program to allow time for planning, hotel negotiations, publicity and potential cancellation if funding is not timely received. The request must include:
 - 1. Program Date
 - 2. Identification of any potentially conflicting events
 - 3. Preferred Location
 - 4. Number of MCLE Hours to be offered
 - 5. Number of Speakers to be Invited
 - 6. Identification of potential financial supporters and amounts to be collected
 - 7. Proposed pricing of program

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

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

- D.** Single venue programs are required to control reimbursement expenses

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

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

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

Adopted by CLE committee 9/20/14

ISBA Law Ed Financial Contributor Policy

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

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

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

Third-Party Financial Supporters

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

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

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

Adopted by the CLE committee June 2, 2012