N.C. Bar Association’s CLE Planner’s Guide

- Getting Organized
- Construction of the Program Agenda
- Selecting the Speakers
- Provide Guidance to the Speakers
- Plan Marketing Strategy
- Edit the Manuscripts
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PROGRAM PLANNING IS CRITICAL

In planning and executing continuing legal education programs, the critical link between the CLE staff and the practicing lawyer is you, the Program Planner. This Handbook is written specifically for Program Planners, and it is essential that you read it thoroughly, even if you have been a Program Planner before. As a Program Planner, you are charged with the responsibility of translating the intent of your sponsoring section or committee into action. You must guide the speakers into a cohesive conceptualization and presentation of the program. To accomplish these important tasks, you need to know the rules, guidelines, and tips that are contained in this handbook. Know them, and you will save yourself time, effort, and embarrassment.

This Handbook is designed to lead you through the steps of planning a CLE program for the North Carolina Bar Association (NCBA). The Table of Contents can be used as a checklist.
Part 1
Getting Organized

GETTING ORGANIZED

You may work alone, with a co-program planner, or with a planning committee. Find out if your sponsoring committee, division or section selects these people. If your sponsoring committee, division or section has no tradition or practice concerning a program planning committee, consider forming a committee yourself.

Even if the committee consists of only one or two other people, you will find that there are several advantages:

- Although you are ultimately responsible for the program, they can assist you in performing your duties.
- They may give you ideas and provide opinions about topics, speakers, formats, and other aspects of the program.
- Committee members will be gaining valuable experience as they assist you. They will be natural candidates from which to select future Program Planners, especially if the program is repeated.
- The availability of a co-program planner or committee members assure continuity of the planning process and live presentation of the program in the event of an unexpected illness or other emergency.

TIP: Keep the committee small, so that it will be easier to schedule meetings and communicate by e-mail.

CAUTION: While a Program Planner and a co-Program Planner receive a complimentary program registration, Planning Committees do NOT receive a complimentary program registration and may not submit expenses for reimbursement.
Part 2
Construction of the Program Agenda

Our CLE programs typically run 3 hours, 6 hours or longer. See Appendix 1 for an example of a typical 3 hour program agenda. See Appendix 2 for an example of a 6 hour program agenda with panel discussions and breakout sessions.

DETERMINE THE SCOPE AND CONTENT OF THE PROGRAM

The Program Planner determines the substantive scope and content of the program. Consider:

• who will likely attend the program
• what would the audience find beneficial
• utilizing previously published NCBA program materials
• avoiding overlap with competing programs
• can the potential audience be expanded by offering the program as a webcast
• how the program can be repeated and updated easily in the future
• specific instructions on content or format from your sponsoring committee, division or section

TIP: Do not be afraid to try something new and innovative. If the program has been given in the past, attendees may be attracted by a new format, new speakers, or other fresh approaches to the program.

TIP: The subject matter that receives the greatest attention is that which is practice oriented. The program materials covering the subjects should contain ample forms, checklists and guides. Attendees prefer information and materials that they can use immediately back in their offices.

TIP: Use CLE Search by Subject located in the catalog section of the CLE website to review programs and topics within your subject area that have been addressed in the last three years. Should any topics be redone or updated? Should any topics be avoided? If you want to view materials from

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previous programs, ask the CLE staff to provide them to you. Consider passing these materials on to the speakers for your program.

**DETERMINE THE LEVEL OF PRESENTATION**

As Program Planner, it is your responsibility to determine the level of presentation (i.e., basic, intermediate, advanced, or a combination thereof). As a general rule, section or committee programs should be intermediate or advanced and most other programs should be basic or intermediate.

**ETHICS AND PROFESSIONALISM CONSIDERATIONS**

Determine the specific time to be devoted to ethics and professionalism. Be sure to take into account the amount of mandatory CLE credit requirements (see Appendix 3).

*Tip: If ethics credit is to be offered, the presentation should be at least one full hour. Fractional presentations are not useful to program attendees in meeting their CLE requirements. Not less than one full hour (60 consecutive minutes) must be offered on substance abuse and/or mental health in order to receive State Bar credit.*

**PROGRAM DESCRIPTION AND SUBTOPICS**

Write a one paragraph program description (50–100 words), describing the program content, the level of difficulty, and the target audience. Choose a title for the program that best describes the overall theme of the program. To assist the speakers, you should also determine the proper subtopics within each topic. This exercise will keep the speakers focused and help prevent overlapping topics. The program description and these subtopics also will be useful later when it is necessary to prepare a program brochure.

**DETERMINE THE NUMBER OF SPEAKERS/PANELISTS**

As a general rule, the minimum amount of time allotted to any one speaker should be no less than 45 minutes; the maximum should generally not exceed two hours. A standard one-day, six (6) CLE hours, program should have no more than eight (8) speakers.

Similarly, the number of panels and panelists should be limited. Generally, a panel should have no more than three panelists. More than three speakers on a
panel limits the time a speaker has to provide substantive content. Each panelist should be given at least 30 minutes to speak.

**CAUTION:** Speakers, including panelists, who do not present for more than 30 minutes and do not author a manuscript will not be reimbursed for their expenses.

*TIP:* Where panels or moderators are included in a program, you should attempt to assign the regular speakers in those roles. You are responsible for making sure the panel is fully prepared.

**CAUTION:** Where the recommended number of speakers per credit hour is exceeded, an increased registration fee for the program may have to be imposed to cover the additional costs associated with additional speakers. The CLE Program Subcommittee may reject a program that has too many speakers.

**DRAFT THE AGENDA FOR THE PROGRAM**

Submit the program outline to the CLE staff for review and distribution to the CLE Program Subcommittee for comments and approval. The outline should include segment titles, subtopics, times and breaks. See Appendixes 1 and 2 for sample agendas.

Draft agendas are typically due **five months** before the program date. Early submission and finalization of program agendas ensures the program will receive maximum exposure in all of our marketing materials.
Part 3

Selecting the Speakers

You are responsible for the selection and assignment of program roles for each speaker. In exercising these responsibilities, the quality of the program is the overriding consideration.

EVALUATION FILES

Use the past speaker evaluation files in the CLE office to determine whether to select an individual. The CLE staff will provide these evaluations to you upon request. You can reduce your chances for selecting poor speakers if you use the speaker evaluations. Speaker evaluations can help you choose from among several potential speakers.

LAW FIRM AFFILIATION

Except under extraordinary circumstances, only one speaker from a firm shall be used. Exceptions must be authorized by the CLE Program Subcommittee. If you are not speaking, then a member of your firm may be selected as a speaker.

SPEAKER MIX

Strive for geographical, gender, and minority representation among the speakers. Also consider inviting a young lawyer representative, especially for a panel. This is a goal, not a requirement.

EXPERIENCE

Consideration should be given to those individuals who have previously spoken or written effectively on the subject to be addressed, particularly if that engagement was with the NCBA.
OVEREXPOSURE: NEW SPEAKERS

In evaluating the previous performances of a potential speaker, you should consider whether there is an overexposure problem and, if so, seek out new speakers to work into the system.

*TIP: Consider giving a new speaker a smaller role on a panel or a smaller time slot. If he or she is effective, then more responsibility may be assigned.*

HONORARIA

The NCBA does not pay honoraria or other forms of cash payment to attorneys licensed to practice in North Carolina for speaking, planning or facilitating a NCBA CLE program. This policy does not preclude payment to professional and/or for-profit providers for their services or the extension of honoraria to out-of-state or in-state speakers who are not licensed to practice law in North Carolina.

*CAUTION: Under no circumstances should you bind the NCBA to pay an honorarium, a speaking fee, or other expense exceeding the reimbursement cap without prior approval from the CLE staff.*

FINAL APPROVAL

After you complete the process of selecting speakers, contact the speakers to see if they will participate. Once you have your list of speakers, inform the CLE staff as soon as possible. Provide the speakers’ full names, addresses, phone numbers, and e-mail addresses to the CLE staff. The staff will send instructions on program deadlines and manuscript preparation to each speaker.
Part 4
Provide Guidance to the Speakers

INVITATIONS TO SPEAK

After you have selected your speakers, arrange a conference call or a meeting of the speakers to discuss your vision of the program. Keep your CLE Staff Program Manager informed of these meetings and invite them to participate. (See Appendix 4 for a Sample Conference Call/Meeting Agenda.)

If panels or other non-lecture formats are used, it is imperative that you coordinate these efforts to ensure a quality presentation. Panel members should meet several times in advance to rehearse their portion of the program.

Discuss with your speakers:

- **Program Objectives:** “What do we want the audience to learn during the program?”
- **Target Audience:** “Is this an entry-level basics program or one that is for more advanced practitioners?”
- **Topic Content:** “Are there new case law developments or new legislation that should be discussed?” “Are there common practice mistakes to watch out for?” “Does the topic lend itself to a particular format (i.e. breakout sessions; panel discussions; mock trials; judicial commentary; use of technology)?
- **Topic Presentation:** Explore new and innovative approaches to present the material, especially if common topics are included in the program by necessity.

*TIP: Remember, you have ultimate responsibility for the program. Take the time to satisfy yourself that the speakers are taking their responsibilities seriously.*

REQUIREMENTS FOR SPEAKERS

Instruct the speakers that:
• They should anticipate their presentation will be recorded and/or webcasted.
• They will be expected to prepare program materials covering the subject which they will be addressing. **This is a State Bar requirement for the program to receive CLE credit.**
• The firm deadline for delivery of the draft program materials to the Program Planner is at least six weeks before the beginning date of the program. **Materials are to be submitted in electronic format, preferably in Microsoft Word.**
• The deadline for program materials to the Bar Center is **at least three weeks prior to the date of the program.** Program materials include manuscripts as well as a copy of any PowerPoint presentations the speaker plans to use.

**TIP: If a good speaker has a poor track record for timely submission of written materials, consider finding a ghost-writer to assist the speaker.**

**SOLICIT SPEAKER AV NEEDS**

Knowing AV needs in advance is imperative. Remind speakers early to think about using audio visual aids to enhance their presentations and advising the CLE Staff Program Manager of their needs. **Encourage the use of PowerPoint presentations so that the program can be used as an online presentation.**
Part 5
Plan Marketing Strategy

The CLE staff will market your program for you but they will need your help to do it well.

PROGRAM TITLE

Start with a good program title and program description.

- Wrong: “Corporate Practice”
- Right: “How to Incorporate and Counsel a Business: From Choice of Entity to Corporate Maintenance”

PROGRAM OVERVIEW

Describe the scope of the program, its goal and objectives. In 50–100 words or so, describe the problems the program will help solve, why such a program is needed and the program’s approach. Keep in mind that a shorter overview works better for all forms of electronic marketing, especially email. The program overview should answer the question “Why attend?”

- Example: “Geared to both active and occasional practitioners of land use matters, the first CLE of its kind — and the first CLE planned by the new Zoning, Planning and Land Use Section — focuses on the non-legal aspects that every serious practitioner must know like traffic, mapping, site design, planning theories, and dealing practically with streams and wetlands.”

PROGRAM BENEFITS

Make the reader want to attend the program that you are planning. List three to five benefits of the program. The program benefits should tell someone what they will receive from attending the program, what they will take away with them, a benefit to attending.

- Begin each benefit with action verbs:
  - Learn how to …
  - Gain practical skill in …
  - Stay current on …
• Avoid:
  • To, about, a, an
  
  Example: “How the three most recent cases from the N.C. Supreme Court on automobile searches change the expectation of privacy.”

**PROGRAM HIGHLIGHTS**

Use three to four bullets to highlight the key points of the program. No more than 25 words.

• Examples
  • Use and limits of protection
  • Hot topics in military custody cases
  • Orders for production of records

**AGENDA SUBTOPICS**

Use the subtopics that you drafted earlier (see page 4). Write a sentence or two about each topic. **These sentences should expand on the program benefits.**

• Wrong: “Breathalyzers will be discussed.”
• Right: “Gain a solid understanding of how breathalyzers work.”

• Extol the wisdom and experience of the speakers.

• Use action-oriented, conversational words. Be specific.
  • Examples: “Four techniques for …”
    “Three different types of …”
    “The five most important provisions of …”

• Write in the active, not passive voice.

• Remember your target audience.

A good program brochure can make a distinctly positive difference in the number of program attendees. The brochure may be witty or funny, but it must be informative. (See Appendix 5 of a sample of a good program brochure). The CLE staff will assist you. Upon request, they will provide other examples of well-written brochures. **Remember, even the best planned program will not be well attended if potential attendees do not know about the program and want to attend.**
CAUTION: Failure to meet the deadlines listed on Appendix 7 could result in poor attendance or worse — postponing or canceling the program.
Part 6

Edit the Manuscripts

**REMINDERS TO SPEAKERS**

At least **one month** before the draft manuscripts are due to you, contact all of the speakers and determine their progress in the preparation of their manuscripts. Remind them of the manuscript deadline and the importance of meeting it.

**REVIEW THE MANUSCRIPTS**

When the manuscripts are received, review them for proper level and scope, coordination with other subtopics, and for general accuracy. Review them for grammar, syntax, and spelling. Do not be hesitant to ask a speaker to revise, expand, or correct any portion of his or her manuscript that you consider to be below acceptable standards.

**REQUESTING COPYRIGHT PERMISSION**

Infringing another’s copyright may be a serious offense. For this reason, you must be alerted early in the planning stages if any speakers are submitting copyright materials in their manuscripts.

CAUTION: If speakers wish to duplicate copyrighted materials from other sources in their manuscripts, then they must obtain the express written permission of the copyright holder. If reprint permission cannot be obtained, then the NCBA cannot reprint the materials.

If permission is obtained, then the materials may be reprinted in our program materials. In such cases, proper credit must be given to the copyright holder by including on the reprint: “Reprinted with permission. All rights reserved, ______. Copyright ______.”

**FINAL EDITING OF THE MANUSCRIPTS**

Final editing needs to be completed before the final manuscript deadline so the manuscripts can be uploaded to course materials for attendees in advance of the program. Edit the manuscript for form and content. **Note that expenses will not be reimbursed in cases where the manuscript is not submitted on time, or not submitted at all.**
Part 7
Program Functions

THE PROGRAM PLANNER AS SPEAKER

If you are also a speaker, you have the same responsibilities as any other speaker. These responsibilities are outlined under a separate Speaker's Guide.

THE PROGRAM PLANNER AS MODERATOR

You should plan to sit at the head table during the entire program and introduce all the speakers, unless alternate arrangements are made for other moderators. You must coordinate with your Assistant Director of CLE before the day of the program on what announcements should be made (with special attention to sponsorship announcements), the procedures and timing for the next day, including registration, breaks, lunch, special events, announcements, and the importance of keeping the program on schedule. If the program is being webcast, you will be the point person for laptop on which webcast participants can send questions to the speakers.

PROGRAM CONTROL

Control of the program lies in your hands. In fairness to all the speakers, it is important that the schedule for the day be followed by each of the speakers. It is critical that speakers adhere to the hours listed on the brochure for purposes of mandatory CLE credit hours.

CAUTION: It is important to keep speakers on schedule so they do not infringe on another speaker's time or end early. Be prepared to field questions from the attendees or pose questions to the speaker whose presentation is shorter than the time allotted.
QUESTIONS AND ANSWERS

If questions from the floor are allowed, it is essential for the moderator to repeat the question from the lectern for the benefit of the audience, and especially if the program is being recorded and/or webcasted.

TIP: We suggest that written questions be required, so that the moderator can read the question from the lectern. Written questions can be screened beforehand to avoid unnecessary duplication and to give the responding speaker an opportunity to think about the answer.
Part 8

Program Evaluation

Planners will receive a summary of the program evaluations, approximately three (3) weeks after the program.
Part 9
Incidental Information

PROGRAM FEES

Program Planners, speakers and panelists who present for more than 30 minutes receive a complimentary registration and do not have to register for the program. The NCBA will pay the North Carolina State Bar mandatory CLE fees associated with their participation in the program. Members of a Program Planning Committee do not receive complimentary registrations nor are they reimbursed any expenses.

SPEAKER CREDIT

Speakers and panelists will receive six hours of CLE credit for each hour of presentation time in addition to hour-for-hour credit for additional time actually spent in the program. No such credit presently exists for Program Planners, unless they are also speakers. As Program Planner, you will receive full credit for the actual time spent in the program.

EXPENSE REIMBURSEMENT

• The NCBA will reimburse the Program Planner and the speakers (please see the Speaker Guide for specifics on speaker expense reimbursement) for direct expenses while participating in this project.
• Submitted expenses must be held to less than $350 per person, including lodging, meals, and travel. Detailed receipts must be included with the submission.
• No reimbursement will be made for alcoholic beverages.
• Travel by private automobile is reimbursed at the IRS per mile rate.
• Reimbursement for gratuities is limited to eighteen percent (18%).
• When multi-day programs are held at remote locations (i.e. not the NC Bar Center in Cary), the Assistant Directors of CLE will determine any planner fees in excess of $350 as follows:
  o In no event should the excess fee exceed $750.
  o For multi-day programs, no more than the required nights at the host hotel will be approved at the NCBA room block rate.
  o Meals will be reimbursed up to a cap of $100 per day, after considering meals that are provided during the program.
  o Mileage will be reimbursed if the planner has traveled in excess of 25 miles to the program.
• In limited situations, a one-day program will be eligible for reimbursement in excess of $350, with the advance approval of the CLE Director.
• The NCBA cannot reimburse for research, telephone calls, conference calls, faxing, administrative support, or for spouse’s expenses.

CAUTION: Claims must be filed within sixty days from the date incurred, using the reimbursement form provided. Expenses incurred in May or June must be submitted no later than June 20 in order to be accounted for in the proper fiscal year. Requests not made in the time frames outlined in this paragraph will not be paid.

RECEIPTS

The NCBA prefers itemized receipts, not just a credit card receipt, for all expenses for which reimbursement is requested but only requires receipts for items $25 or more. Recognizing that there are times when obtaining a receipt is difficult and awkward, under special circumstances the NCBA will make reimbursement for an expenditure without a receipt, but documentation must include a description of that which was purchased, why it was purchased, and an explanation of why no receipt is available.

For NCBA non-reimbursable expenses, (i.e. over the cap or donated) the IRS requires the following information for all expenditures of $25.00 or more:

• The business purpose.
• Date and location.
• Names and positions of individuals entertained, if applicable.

Requests for reimbursement submitted without the proper documentation will not be paid until the proper documentation is presented. If proper documentation is not submitted within 60 days following the program, the request will not be paid.
Part 10

Program Planner Questions

If you have questions about Program Planner duties and responsibilities that are not answered by this Handbook, then please contact your Assistant Director of CLE. See Appendix 6 for an Overview of Program Planner Responsibilities. See Appendix 7 for a program planner timeline.
Appendix 1

Sample Three Hour Program Agenda

Agenda
8:00–8:30 a.m.  Registration & Continental Breakfast
8:30–9:30  Corporate Compliance: What To Do and How To Do It • Calloway
• Proper and improper investigations
• What cooperation means to the Department of Justice
• Determining the scope of the investigation
• Maintaining attorney-client and work product protections
• Conducting the investigation
9:30–9:40  Break
9:40–10:40  The New Deferred Compensation Rules:
What You Need to Know Now • Capwell
• New requirements imposed by the rules
• Common issues that must be addressed in 2011
• Special transition rules for 2011
• Strategies for complying with the new rules
• Traps for the unwary
10:40–10:50  Break
10:50–11:50  Teaching Contract Law to Non-Lawyers: Methods that Really Work • Stone
• Planning your training
• What to do and not to do
• Key clauses to consider
• E-commerce issues
• Other people’s contracts

CLE CREDIT: 3.0 Hours
Appendix 2

Sample Six Hour Program Agenda

Agenda
8:30–8:55 a.m.    Registration
8:55–9:00    Introductions and Announcements • Rusher
9:00–10:00    Diagnosis, Treatment and Care of the Debtor Client • Wright
Find out how to conduct an initial interview and consultation with your client, what you should advise the client to bring to the meeting, and what questions you should ask of the client to determine whether bankruptcy is an appropriate option for the client. Discover what factors should be considered when advising a client which chapter of the Bankruptcy Code would be appropriate for the client’s particular financial situation.

10:00–10:45    Representing the Chapter 7 Debtor • Robicsek
Learn about the special issues that often arise in representing Chapter 7 consumer debtors including objections to discharge and dischargeability of debt, bad faith filing challenges under Section 707(b), exemption and exemption planning issues, including how your client’s pre-petition actions can be undone by the Chapter 7 Trustee as preferential transfers or fraudulent conveyances, and lien avoidance issues.

10:45–11:00    Break

11:00–12:15 p.m.    Representing the Chapter 13 Debtor • Anderson, Gourley and Orcutt
Let this panel of experienced Chapter 13 Debtor’s attorneys from each of our three Districts in North Carolina explain how a Chapter 13 case is administered in each district: the role of Debtor’s attorney, the role of Debtor and the role of the Chapter 13 Trustee.

12:15–1:00    Lunch (included at Live program only)

1:00–1:45    Representing the Chapter 11 Debtor • Oliver
Whether your client is an individual or a business, learn about the significant planning and preparation required to file and successfully complete a Chapter 11 Reorganization case. Find out how timing of the filing of the petition may impact your need to file First Day Motions, how to deal with cash collateral and DIP financing issues early in the case, how to live with or without an official committee of unsecured creditors, and more.

1:45–2:30    Representing your Client Before the Court • Nardone
Find out how to be a successful advocate for your client before the Bankruptcy Judge. Learn the proper method for addressing the Court, tendering exhibits and evidence, addressing witnesses, and basic courtroom demeanor. Find out how to make your pleadings a welcome read for the Judge, and what to avoid in your pleading preparation and courtroom presentations.

2:30–2:45 Break

2:45–3:30 Diagnosis, Treatment and Care of the Creditor Client in Consumer Cases • Livermon
Learn how to protect your secured creditor client and its collateral by moving for relief from the automatic stay to foreclose, repossess or evict, how to obtain a reaffirmation agreement and when it is appropriate in the Fourth Circuit, and how to defend lien avoidance actions.

3:30–4:15 Diagnosis, Treatment and Care of the Creditor Client in Business Cases • Tarr
Discover how to protect your secured creditor client in the business Chapter 7 and Chapter 11 case. Learn how to represent an official committee of unsecured creditors in a Chapter 11 case and maximize the recovery for unsecured creditors, and more.

CLE CREDIT: 6.0 Hours
Appendix 3

Mandatory CLE Credit Requirements
as Stated by the N.C. State Bar

- 12 hours per year
- Two hours of the 12 must be ethics or professionalism
- One hour of substance abuse/mental health training once every three calendar years

(Note: Mental Health/Substance Abuse training must be one full hour (60 consecutive minutes) in length. No credit will be awarded for this requirement if the training is less than one hour in length.)
Appendix 4

Sample Meeting Agenda
for Initial Speaker Meeting

MEMORANDUM

To: The Rivers Protection Act and Regulations Faculty
From: Jonathan C. Small, Esq.
Date: July 22, 2011
Re: First Planning Meeting Agenda

*******************************
I. Program Date: Wednesday, December 1, 2011; 9 am-4 pm

II. Review Learning Objectives

III. Select Program Format(s)

IV. Develop Detailed Program Agenda

V. Assign Presentation Topics and Responsibilities

VI. Review Draft of Brochure

VII. Written Materials
   A. Outline Scope and Content (including list of exhibits and appendices)
   B. Assign Responsibilities
   C. Deadline—September 3, 2011

VIII. Consider Use of Presentation Aids

IX. Schedule Final Planning Meeting
Appendix 6

Program Planner Guidelines (Overview) and Timeline

This appendix provides an overview of the Program Planner Guide. Please refer to the program planner packet for a complete set of guidelines. A timeline is also provided at Appendix 7 to assist you in planning your program.

• Program planners determine the substantive scope, content and level of the program.

• Speakers:
  - Select only one speaker per law firm.
  - Mix of large, medium and small firms.
  - Remember diversity in age, gender and ethnic origin when choosing speakers.
  - Number of speakers is determined by the number of hours in the program. A rule of thumb: the minimum amount of time allotted to any one speaker should be no less than 45 minutes and no more than two hours.
  - Speakers, including panelists, presenting for less than 30 minutes will not receive a complimentary program registration.
  - When a panel discussion is included, try to assign the regular speakers as panelists.
  - Honoraria is not permitted for attorneys licensed to practice in North Carolina.
  - Out-of-state speakers – discuss with CLE staff. Clear travel expenses in advance.

• Agenda:
  - The agenda is the program outline and is due five months before the program date.
  - The agenda should include speaker topics, subtopics, times and breaks. Include a program overview: who should attend, why attend, important program benefits and highlights.

• Program requirements:
  - Speakers are expected to prepare program materials covering the subject that they are addressing. Please pay special attention to the deadlines listed on your program planner letter. At times, speakers need to be “encouraged” to stay on schedule.
  - Program materials should be substantive, not mere outlines or just PowerPoint presentations.
• **Expense reimbursement & complimentary program registration:**
  - The Bar Association will reimburse the program planner and speakers for direct expenses while participating in this project. Reimbursement amounts vary from program to program. Submitted expenses must be held to less than $350 per person, including lodging, meals and travel.
  - Program Planners receive **complimentary** registration to the subject program.
  - Speakers and panelists also receive complimentary registration provided they present for 30 minutes or more. Please plan accordingly.
  - Planning Committees, however, do **NOT** receive a complimentary program registration and may not submit expenses for reimbursement.

The CLE staff stands by to assist you with this program. Please do not hesitate to call us, if there is any way we can help you.

(800) 228-3402 (ask for CLE) or (919) 677-8745.
Appendix 7

Program Planner Timeline

All time periods relate to the date of program.

• **Six months (or earlier)**
  • Determine scope, control and level of program
  • Consider including an hour of ethics, professionalism, mental health or substance abuse
  • Draft a one-paragraph description of the program
  • Determine the number of subtopics and speakers
  • Draft agenda
  • Submit agenda to CLE staff
  • Select speakers
  • Contact speakers
  • Submit speakers’ names, addresses, phone, FAX and e-mail addresses to CLE staff

• **Five months**
  • Arrange conference call or meeting with speakers
  • Advise your CLE staff program manager of the meeting
  • Discuss with your speakers:
    • Program objectives
    • Target audience
    • Topic presentation
    • Manuscript preparation
    • Manuscript deadlines

• **Four months**
  • Provide to your CLE Staff Program Manager:
    • Final program overview
    • Final program benefits
    • Final program highlights
• Review proof and edit draft program brochure

• Three months
  • Ensure any panels and panel moderators coordinate their panel discussion
  • Remind speakers that manuscripts are due to you six weeks before the program

• Two months
  • Review speakers’ manuscripts
  • Ensure copyright permission has been obtained when necessary

• One month
  • Remind speakers to submit final version of manuscripts to CLE staff three weeks before the program
  • Remind speakers to submit their audio-visual requirements to the CLE staff

• One week
  • Arrange a final program review and coordinate presentations
  • If there is a faculty dinner, use the dinner for a final review of the program

• Day of program
  • Ensure the program starts and ends on time
  • Give any administrative announcements provided by CLE staff
  • Introduce each speaker
  • Ensure that each speaker starts and ends on time
  • Ensure all questions are repeated by the speaker
  • If the program is Webcast, provide the speakers with all questions from the Webcast audience that will come in on the laptop computer provided.

• Day after the program
  • Evaluate the program
  • Provide your evaluation to:
    • CLE staff program manager
• The appropriate Bar Association section or committee

• Two days after the program
  • Take the day off – you earned it!