NCBA CLE Program Planner Guidelines

We’re excited that you’re planning a CLE program with the NCBA!
Here is some information to help guide you along.

Planning the Program:
Program planners determine the substantive scope, content and level of the program.
Consider the following:
• Who will likely attend the program?
• What would the audience find beneficial?
• What is the appropriate level of the presentation (i.e. basic, intermediate, advanced or
combination thereof)?
• Will topics overlap with competing programs?
• Can it be repeated and updated in the future?
• Where and when should the program take place?
• Will an hour of ethics/professional responsibility or substance abuse/mental health attract
a larger audience?

Finding your Speakers:
Outside of program content, speakers are one of the major draws to attending NCBA CLE.
When selecting speakers for your program, consider the following:
• Select only one speaker per law firm.
• Incorporate a mix of large, medium and small firms when choosing speakers
• Remember diversity in gender, age and ethnicity when choosing speakers.
• When a panel discussion is included, try to assign speakers from other sessions as panelists.
• Honoraria is not permitted for attorneys licensed to practice in North Carolina.
• Out-of-state speakers must be discussed with CLE program manager in advance.
• The minimum speaking time allowed for credit by the NC State Bar is 15 minutes.
• Speaker reimbursement is typically capped at $350 per speaker.

Setting the Agenda:
The agenda is the program outline and is due four months before the program date. The agenda
is critical as it tells attendees who should attend and why they should attend. Additionally, it
provides information on important program benefits. Your CLE program manager will provide
a template for you to use. The agenda should include:
• Program title (Make it catchy, but keep it simple.)
• Program summary (50–100 words to provide an overview of the program and point out why
people should attend. This summary will also be used for marketing purposes.)
• Session topics including a few sentences highlighting each topic
• Times of sessions and breaks
• Speaker information (full name, firm name and address, phone number, email address)
Review Speaker Manuscripts:
Speaker manuscript drafts are due to you eight weeks before the program. When you receive the drafts, review them for the 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.

Managing Your Speakers:
Discuss expectations with your speakers. Speakers are required to prepare program materials covering the subject that they are addressing. At times, speakers need to be reminded by you to stay on schedule. Speaker program materials should be substantive, not just outlines or PowerPoint presentations. In particular, PowerPoint presentations will not be accepted as program manuscripts. If a speaker is reproducing copyrighted materials, remind them that they are responsible for ensuring their materials do not infringe on the copyright.

We encourage you to have a conference call or meeting with your speakers to discuss your vision of the program and general expectations. Please keep your CLE Program Manager informed of these meetings and invite him or her to participate.

Expense Reimbursement and Complimentary Program Registration:
- The Bar Association will reimburse each program planner, speaker and moderator up to $350, or as otherwise indicated, for direct expenses incurred while planning and speaking at your program pending they speak for the minimum amount of time. Typical expenses include lodging, meals and travel for speakers living more than 25 miles from the program.
- Program planners and moderators receive complimentary registration to the program.
- Speakers and panelists also receive complimentary registration provided they meet the minimum presentation requirements.
- Planning committees, however, do NOT receive a complimentary program registration and may not submit expenses for reimbursement.

Attend the Program:
It is important that you plan to attend the CLE program. On the day of the program you will help moderate the program, keep the program on time and ask questions of the speakers. Further, you’ll help make announcements, introduce speakers and monitor the webcast tablet for any questions (not all programs are webcast).

The NCBA CLE staff stands ready to assist you with your program. Please do not hesitate to call us at 800.228.3402 (ask for CLE) or 919.677.8745.