Understanding CLE
From Baseline to Best Practices for Live Programs

Wednesday, April 10, 2013
Setting and Achieving CLE Goals: Thinking Strategically About CLE
Thinking Strategically About CLE

A Balanced Diet Approach

Takeaways:
1) Why do CLE?
2) What are your options?
3) How to get the most out of a portfolio
4) See you at the top!
Thinking Strategically About CLE

_A Balanced Diet Approach_

A caveat:

Consider how these fit with in-person meetings—one day in-person CLEs or CLE at entity meetings.
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Audience question time!

Why do your members want to put on CLE programming?
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Some answers

— Make money
— Educate
— Recruit
— Retain
— Be Reliable
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Audience question time!

If you have different goals for CLE, should you expect one type of programming to achieve every desired result?
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Different reasons/different results

Strategically consider goals and then decide on what CLE programming plans work for your group
A Balanced CLE Programming Diet

- Traditional: 40%
- Hot Topic: 13%
- Member Benefit: 7%
- Brown Bag: 40%
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What are your options?
1) Traditional
2) Hot Topic
3) Member Benefit
4) Brownbag (Non-CLE)
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**Traditional CLE**

- Identify basics courses
- Identify knowledge gaps
- Understand the planning process
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Know your entity’s basics courses:
- Evergreen
- Market-driven
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Find the demand gap

- Need-based
- Newsworthy
- Non-legal
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How long should you give yourself to plan?

9 weeks

When would you forgo the 9 weeks?

Hot Topic
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What’s a Hot Topic program?
A traditional program that can’t wait
– Recent court decisions
– New regulations
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Member Benefit

– Simple

– Scheduled
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Brownbag

– Easy
– Informal
– Scheduled
– Overlap?
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Programming Portfolio Considerations
– What are our goals?
– How much can we take on?
– How do we balance our offerings?
– How do our standalone CLE offerings fit with our traditional entity meetings?
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What’s your best program?
Let’s get it recognized!
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ACLEA’s Best Program Criteria

– Exemplary
– Focused
– Creative
– Well-constructed
– Marketed well
– Successful
– Cost-efficient
– Wise use of resources
Questions
Effectively Marketing a CLE Program
Increase Your Program’s Appeal

• Developing Great Content
• Expanding Your Reach by Sponsoring Programs with Mass Appeal
• Incorporating Current Legislation, Trends and Topics
• Highlighting Star Speakers
Increase Your Program’s Appeal

Expanding Your Reach by Sponsoring Programs with Mass Appeal

Making Sense of the Tax Provisions of Partnership Agreements

Forum Committee on Affordable Housing and Community Development Law
Increase Your Program’s Appeal

Incorporating Current Legislation, Trends and Topics

EEOC Commissioners Explain Final ADAAA Regulations
Section of Labor and Employment Law

UCC Article 9 Amendments
Business Law Section
Increase Your Program’s Appeal

*Highlighting Star Speakers*

**EEOC Commissioners Explain Final ADAAA Regulations**
*Section of Labor and Employment Law*

**Killer Cross Examination**
Featuring Victoria Thomas McGhee and Stephen D. Susman
*Section of Litigation*
Develop a Marketing Plan

- Begin the planning process at least 9 weeks in advance to allow ample promotion time for your program.
- Create attractively titled programs with stellar content.
- Determine a schedule of when information about the program will be included in your entity’s communications.
- Suggest language to faculty and those who manage blogs, social media, list serves, committee communications where the program may be promoted.
- Continue to promote the products from your programs to garner additional revenue for your entity.
Creating Effective Titles

The shorter the better as long as the title maintains the meaning of what the program discusses.

TIMSS = 100 character limit
Twitter = 140 character limit
Creating Effective Titles
Creating Effective Titles
Creating Effective Titles

140 Character Limit!
Creating Effective Titles

Good Titles

Communication Ethics in Child Custody Cases

Direct and Cross-Examination in a Family Law Trial

Tax Issues of the Madoff Scandal:
Advising Victims of Investment Fraud

Security and Ethics of Cloud Computing
Creating Effective Titles

This Old House: Protecting Your Client's Interest in What Can Be the Most Valuable and Least Understood Asset in Divorce

Protecting Your Client’s Real Estate Assets in Divorce
Creating Effective Titles

Prescription Drug Abuse — A Rising Epidemic: Legal Implications and Prevention Strategies in Employment and Family Law

Prevention Strategies and Legal Implications of Prescription Drug Abuse
Creating Effective Titles

Bankruptcy for Non-Bankruptcy Attorneys: What Every Family Law, Criminal Law, Real Estate and Litigation Attorney Should Know if a Party Files Bankruptcy

Bankruptcy for Non-Bankruptcy Attorneys
Creating Effective Titles

• Write Titles Like Headlines
• Write for the Web
• Titles Should Address a Need
• Give Titles Greater Shelf-Life
• Clarity vs. Cleverness
Where to Market Your Program

- Print Collateral
- Building an Online Presence/Branding
- Pre-program E-mail Communications
- Social Media Outlets
- Post-program E-mail Communications
Ten Things Lawyers Love/Hate About Mediators - News Details

Date: April 7, 2011
URL: http://apps.americanbar.org/cle/programsl11hm1.html

In this program, attorneys and mediators will discuss tools used by mediators that work or hurt resolution, the appropriateness of somewhat manipulative efforts, evaluative versus facilitative mediation, the process of mediation and "late in the day" resolutions, and why mediators do many of the things they do. This program will provide attorneys with better mediating skills and will let mediators hear what attorneys are really thinking – a "win-win" – just like good mediation!

This program will focus on:
- attorneys understanding mediator tools and approaches to better utilize mediation for case resolution;
- attorneys learning how to cope with mediator tactics that are not furthering mediation and may be inhibiting resolution;
- attorneys hearing from other attorneys on mediation tools and approaches that may work for them;
- educating mediators on tools and approaches that are not effective to improve their ability to help clients; and
- educating mediators on the approaches used by other mediators that are effective, so mediators can consider different styles and tools in mediations.

Program Faculty:
JoBI Haber (Moderator), ADR Services, Inc., San Diego, CA
Christopher M. Burke, Scott + Scott LLP, San Diego, CA
Michael A. Geibelson, Partner, Robins, Kaplan, Miller & Ciresi LLP, Los Angeles, CA
Brant C. Martin, Partner, Wick Phillips Gould & Martin, LLP, Fort Worth, TX

Purchase the Recording CD-ROM:
Order through the ABA Web Store - http://apps.americanbar.org/aba/store/index.cfm?
session=mainMfrnProductAdToCart&pid=CE11THMCDR or call 800.285.2221. Refer to product code CET11THMCDR.
Online Marketing: Best Practices

• Use keywords
• Keep the most important information about your program “above the fold”
• Prepare marketing messages that are easy for faculty and potential registrants to share.
• Make it as easy as possible for a person to register.
Need Help?

If you have questions that arise during the program planning process, please don’t hesitate to ask. We are here to help!
Questions
Creating & Securing a Stellar Panel
Step One: Consider the Topic

• Who are the experts? The sky is the limit!
• Diversify the knowledge base among speakers
  – Include judges, regulators and general counsel when possible
  – What other viewpoints are relevant?
Step Two: Choose Carefully

- Pick a speaker who can commit
- Ability to discuss the topic in plain language
- Develop a BS plan
  - Back-up Speaker
- Find a moderator who can lead the group
  - On time and on track
  - New or experienced
Step Three: Count the $$$

• Select speakers who others want to hear
• Recruit speakers who are willing to share their personal contacts
• Be willing to go beyond your entity’s membership to find talent
Step Four: Diversify

• Goal III Objectives:
  – Promote full and equal participation in the association, our profession, and the justice system by all persons.
  – Eliminate bias in the legal profession and the justice system.

• Goal III Categories:
  – Gender
  – Ethnicity
  – Persons with disabilities
  – Persons of differing sexual orientations and gender identities
Diversity Plan has been approved!
Diversity Plan: CLE Points

• Implement strategic actions to improve diversity among speakers, moderators, and attendees
• Ensure program content appeals to diverse communities, consistent with the sponsoring entities’ subject matter specialties, if any
Diversity Plan: CLE Points

• Explore partner or cosponsor opportunities with affinity bars and other organizations that can contribute to diversity
• Ensure program venues and materials are accessible to participants with disabilities
Diversity Plan: CLE Points

• Urge ABA entities to use program locations and venues, as well as social media, to enhance opportunities for participation by diverse lawyers and law students
ABA Member View

**Latham & Watkins** – “We work toward our diversity goals through mentoring and career development as well as recruiting.”

**Bryan Cave** – “Diversity brings depth and richness to our individual professional experiences, binds us to the communities where we practice, and makes our firm a better place.”

**Greenberg Traurig** – “Helping today’s lawyers become tomorrow’s business and legal leaders means a larger, more diverse marketplace and a greater pool of talented professionals. And that means more business opportunities for everyone – our firm, our colleagues and, most importantly, our clients.”
Three Cs and a D

• Consider the Topic
• Choose Carefully
• Count the $$$
• Diversify
How Can I Do It?
Ask Your Members

Scenario One:

Your program coordinators e-mailed you the list of potential panelists and you notice the panel is not diverse. You know that having a diverse panel makes good business sense and is your entity's policy. You contact the coordinators and their reply is that they cannot find any diverse speakers. What do you do?
The American Bar Association General Practice, Solo & Small Firm Division
and the ABA Center for Continuing Legal Education
Present a 90-Minute Teleconference and Live Audio Webcast

General Practice 101: Avoiding Solo/Small Firm Ethical Traps
Thursday, November 5, 2009

ETHICS CREDIT

12:00 PM – 1:30 PM Eastern | 11:00 AM – 12:30 PM Central | 10:00 AM – 11:30 AM Mountain | 9:00 AM – 10:30 AM Pacific

PROGRAM DESCRIPTION

OUR EXPERT SPEAKERS

William K. Mills, Founding Partner, Parker Shumaker Mills LLP,
Los Angeles, CA – Mr. Mills practices in complex business litigation, including insurance coverage; legal malpractice; products liability; real estate; corporate governance; estate planning and probate; intellectual property; and general corporate and governmental representations.

He has served as judicial extern and judicial law clerk to the Honorable Terry J. Hatter, District Judge, United States District Court for the Central District of California, from 1981 to 1982, and was formerly associated with the Public Finance Group of Buchalter, Nemer, Fields & Younger, Los Angeles, where he served as bond counsel, underwriter’s counsel, and letter of credit bank counsel in connection with a wide variety of complex municipal finance transactions.


David B. Parker, Founding Partner, Parker Shumaker Mills LLP, Los Angeles, CA – Mr. Parker is a recognized expert in the areas of professional liability, malpractice defense, and other areas of general business litigation.

TELECONFERENCE/AUDIO WEBCAST TUITION

$90 General Practice, Solo & Small Firm Division Members
$130 ABA Members
$150 All other registrants
$75 Additional registrants who use the same phone line.

All participants must be registered for the program.

UNABLE TO PARTICIPATE?
The complete program will be available on audio CD.

Visit www.abacatalog.org for more information and to order

$125 General Practice, Solo & Small Firm Division Members
$135 ABA Members
$450 All others
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Complimentary for ABA Solos in Private Practice!
$1200 General Practice, Solo & Small Firm Division, Law Practice Management Section and Young Lawyers Division Members (Save 40%)
$1620 ABA Members (Save 20%)
$2040 Non-ABA Members

Small Business Basics

Thursday, September 30, 2010

OUR EXPERT FACULTY
Anne Shaw, Attorney, Anne Shaw Attorney at Law, Pearl Harbor, FL
Ellen Tanowitz, Attorney, Tanowitz Law Office, Newton, MA
William Mills, Founding Partner, Parker Shumaker Mills LLP, Los Angeles, CA

Co-Sponsored by the ABA Center for Continuing Legal Education,
Utilize ABA Resources

Scenario Two:

Your planning committee has asked you to identify diverse ABA members who can serve on a panel. In particular, they are looking for attorneys whose profiles fall within one of the ABA Goal III categories. Your program is less than two months away. What can you do?
Utilize ABA Resources
Utilize ABA Resources
Adonica-Jo R. Wada is a partner at Simon Gluck & Kane LLP where her practice is focused in Customs and International Trade Law, representing companies in a wide range of import and export related matters pertaining to U.S. Customs and Border Protection. She is a member of the California and Washington State Bars and is admitted to practice before the District Court for the Northern District of California, the U.S. Court of Appeals for the Federal Circuit, and the U.S. Court of International Trade. She is also a member of the Customs and International Trade Bar Association, the National Asian Pacific American Bar Association, the Asian American Bar Association of the Greater Bay Area, and the Minority Corporate Counsel Association.
Utilize ABA Resources

• The Goal III entities have a wealth of information
• Contact the Goal III entity of your choice for leads
Utilize ABA Resources

• Center for Racial and Ethnic Diversity
  – Cie Armstead, Director

• Commission on Racial and Ethnic Diversity in the Profession
  – Aracely Muñoz Petrich, Director

• Coalition on Racial and Ethnic Justice
  – Rachel Patrick, Director

• Council for Racial and Ethnic Diversity in the Educational Pipeline
  – Robin Rone, Director
Utilize ABA Resources

• Commission on Mental and Physical Disability Law
  – William J. Phelan

• Commission on Sexual Orientation and Gender Identity
  – Robin Rone

• Commission on Women in the Profession
  – Melissa Wood
Utilize ABA Resources

Stephen W Dale is a recognized and respected disability rights advocate. He is the recipient of the 2010 Theresa Award and the 2007 NAELA Powley Award.
Utilize ABA Resources

Howard Fulfrost is a partner in the Los Angeles office of Fagen Friedman & Fulfrost. He is also a Commissioner for the ABA Commission on Mental and Physical Disability Law
Scenario Three:

Your entity frequently uses your diverse members for CLE presentations and would like to recruit new talent as potential members and speakers. You know you can search the Internet but how?
The National LGBT Bar Association

Each year, the National LGBT Bar Association hosts the Lavender Law® Conference and Career Fair to bring together the best and brightest legal minds in the...

- Lavender Law® Conference
- Board of Directors
- Staff
- About Us
- Contact
- Member Login
- Join us
- Affiliates

More results from lgbtbar.org

Make a difference - National Gay and Lesbian Task Force

Apr 23, 2010 – Make a difference: Speak out against sexual assault behind bars The Task Force is part of a coalition organized by Just Detention ...

Lawyers for justice | National Gay and Lesbian Task Force

I have been active in efforts to educate and mobilize the legal bar around ...

Show more results from thetaskforce.org

National and International Gay and Lesbian Organizations

National Lesbian and Gay Law Association, affiliate of the American Bar Association
http://www.nlglia.org. National Organization of Gay and Lesbian ...
Estate Planning Group

About the Group
The National LGBT Bar Association’s Estate Planning Group was developed as a forum for practitioners to solicit and offer advice on a wide range of estate planning and tax issues. The working group is led by Pat Cain. If you would like to join the Estate Planning group, please contact Juan Garcia.

Patricia Cain is the Inez Mabie Distinguished Professor of Law at Santa Clara Law. Before joining the SCU faculty in 2007, she served as Vice Provost and Aliber Family Chair in Law at the University of Iowa.

She was a member of the faculty the University of Texas for 17 years before moving to the University of Iowa School of Law in 1991. She also held the H.O. Head Centennial Professor in Real Property Law at the University of Texas (1990-91). A member of the American Law Institute and prior board member of Lambda Legal Defense and Education Fund, she is a former co-president (with Jean Love) of the Society of American Law Teachers (SALT). She is currently serving as Treasurer of SALT.

She is a frequent lecturer on tax planning for same sex couples and in 2008 contributed to continuing legal education programs for same sex couples at The Williams Institute, UCLA (Los Angeles), Lavender Law (San Francisco), Kasner Estate Planning Symposium (San Jose), the Santa Clara Estate Planning Council
Estate and Tax Planning for Same-Sex Couples

Tuesday, February 22, 2011

1:00 PM – 2:30 PM Eastern  |  12:00 PM – 1:30 PM Central  |  11:00 AM – 12:30 PM Mountain  |  10:00 AM – 11:30 AM Pacific

PROGRAM DESCRIPTION

Because of the existing patchwork of protection in this country, same-sex couples face many legal uncertainties. While some states recognize relationships between same-sex couples, other states and the federal government may not. This seminar will focus on the ways that attorneys can assist their same-sex couples through estate planning, ownership of property, and tax planning, as well as how clients can protect their relationships with their children.

CLE ALERT

OUR EXPERT PANELISTS ARE:

Moderator: Courtney G. Joslin, Acting Professor of Law, University of California Davis School of Law, Davis, CA

Patricia A. Cain, Inez Mabie Distinguished Professor of Law, Santa Clara University School of Law, Santa Clara, CA

Timothy T. Thomas, The Law Office of Timothy L. Thomas, Dallas, TX

Michele Zavos, Zavos Juncker Law Group, PLLC, Silver Spring, MD

TELECONFERENCE/LIVE WEBINAR TUITION

- $115  Commission on Sexual Orientation and Gender Identity and Section of Family Law Members
- $115  The National Lesbian, Gay, Bisexual Transgender Bar Association
- $150  ABA Members
- $185  All other registrants
- $95  Young Lawyers Division Members
- $95  Government Attorneys
- $45  Students
- $75  Additional registrants who use the same connection.

UNABLE TO PARTICIPATE?

The complete program will be available on Audio CD-ROM.

- $125  Section of Family Law Members
- $135  ABA Members
- $150  All others

Visit www.abacalcatalog.org for more information and to order (please search by program title).

All participants must be registered for the program.

Cancellations and requests for refunds will be honored on the following basis: 2 business days or more, 100% refund; 1 business day or less, 100% refund minus a $25 administrative fee. Substitute registrants are welcome. Scholarship applications are available upon request.

CLE CREDIT

1.5 hours of CLE credit in 60-minute states/1.8 hours of credit in 90-minute states have been requested in states accepting ABA-approved programs.
Remember:

• Three Cs and a D
  – Consider the Topic
  – Choose Carefully
  – Count the $$$
  – Diversify

• Utilize ABA Resources!
Questions