

MEMORANDUM

To: Committee Leaders
From: Dimity Orlet, Assistant Counsel & Director of CLE
Date: May 2015
Re: Committee CLE Opportunities

Did you know that the CBA offers more than 100 live CLE programs each year? CLE events are a fantastic way to serve and engage your members and others in the Greater Cincinnati legal community. Thanks to the contributions of leaders like you, committee seminars have always been at the heart of the CBA's CLE offerings.

CLE team members Angela DeMoss, Monica Kittrell, Michelle Tucker and I look forward to working with you. Our goal is to support each committee in hosting at least one CLE program per bar year. In addition, we encourage you to take advantage of the CBA's "special committee CLE offer," which provides each committee the opportunity to host one one-hour CLE program per bar year (in place of a regular meeting) at a reduced registration fee of \$10. Committee members also have the option of attending this meeting at no cost if they do not wish to claim CLE credit. 60-days notice is needed for the "special committee CLE."

I have attached a copy of the CBA's "CLE Planning Guidelines," which detail the planning process. Please review the planning guidelines to familiarize yourself with the process. The biggest take away is that advance planning is crucial. Because of the lead time required to properly plan and market a quality program, we should begin working on full and half-day seminars at least six months before the event is set to occur. Shorter programs can be planned with a bit less lead-time, but earlier is always better!

Thank you for your time and interest. We look forward to working with you!

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Guidelines

Getting Started

Before you begin planning a CLE seminar, please talk to your CBA CLE staff contact. She is an integral part of the planning process and looks forwards to helping you plan and host successful CLE programs.

Tips for Producing an Engaging Seminar

- Use different formats (panel discussion, hypotheticals, demonstration, audience polling, etc.) to keep the program engaging. Involve the audience as much as possible in the seminar.
- Teach the attendees a new skill or a new way of doing something that will save them time and money or otherwise improve their practice. Share information on best practices and how to avoid common mistakes.
- Provide handouts with information that attendees will refer to and use back in their offices like sample forms, pleadings, and drafting language.

Policies & Procedures

Seminar pricing and administrative policies are set by the CBA Board of Trustees as detailed in the Statement of CLE Policies, attached as Appendix 1. In addition, co-sponsorship of CLE programs is governed by the CBA’s CLE Co-Sponsorship Policy, attached as Appendix 2.

Timeline for Planning & Facilitating a Successful CLE Program

Months/Weeks from Event	Committee Responsibilities	CBA CLE Staff Responsibilities
Annually	Appoint a member of your committee to serve as CLE Coordinator or seminar chair. Recruit CLE planning committee members (if needed).	Manage the CLE program through communication, planning & administration.
12 to 6 Months	<ul style="list-style-type: none"> • Inform CBA staff contact of seminar plans. Arrange a meeting with the CBA staff contact and any other planning committee members. • Request/confirm a program date. • Schedule a meeting with CBA staff contact and planning committee to discuss program planning, develop program outline, etc. • Continue with program planning. • Invite and confirm speakers. 	<ul style="list-style-type: none"> • Serve as liaison with CLE committee, facilitate planning meetings, and keep committee updated on seminar planning and scheduling. • Provide planning committee with available dates. • Meet with seminar leaders, provide past attendance information, planning & marketing deadlines, and program administration/budget information.

4 to 3 Months	Submit final program outline (with speaker names and contact information, presentation titles and timed agenda) to CBA staff contact.	Review draft; make suggestions if necessary.
3 months	Review brochure.	Work with graphic artist to create program brochure.
3 to 2 months	Begin promoting event to colleagues and interest groups (ongoing).	<ul style="list-style-type: none"> • Begin event promotion via email and social media platforms (ongoing). • Contact speakers to confirm presentation details, including the deadline for submission of bios and handouts and AV needs.
2 months	Provide CBA staff contact with a brief description about the seminar that can be featured in the <i>CBA Report</i> .	<ul style="list-style-type: none"> • Submit seminar promotion for inclusion in <i>CBA Report</i>. • Process program registrations (ongoing). • Apply for CLE credit.
1 month		Provide program update to planning committee.
2 weeks		Collect & Compile handouts.
1 week	<ul style="list-style-type: none"> • Confirm program arrangements with CBA staff contact. • Touch base with speakers to re-confirm details. 	<ul style="list-style-type: none"> • Confirm all related logistics. • Distribute seminar eHandout (where applicable).
Day of	<ul style="list-style-type: none"> • CLE Coordinator, seminar chair or designee arrives at least 15 minutes prior to start of the program. • Coordinate/make opening remarks and speaker introductions 	<ul style="list-style-type: none"> • Ready facility (including AV equipment and food & beverage), registration materials and handouts. • Provide script for opening remarks and welcome slides.
Post-seminar	<p>Follow-up to thank speakers.</p> <p>Participate in wrap-up meeting.</p>	<ul style="list-style-type: none"> • Follow-up to thank speakers. • Process and submit CLE credit. • Tabulate program evaluations, schedule wrap-up meeting to review evaluations. Discuss preliminary considers for next year's event.

Appendix I

Statement of General CLE Policies

CLE Accreditation

The CBA accredits the vast majority of its programs for CLE in Ohio, Kentucky, Indiana and Pennsylvania. However, due to variations in CLE rules across jurisdictions, CLE credit may not be available for all of these states for every program. The amount and type of credit available for a specific program will be published on the promotional material and/or on the CBA website for that program. At the attendee's request, the CBA will provide documentation for self-reporting to other jurisdictions.

It is the CBA's policy to comply with the above stated jurisdictions' deadlines for the submission of CLE applications. The filing of untimely applications reflects poorly on the CBA and has the potential to negatively impact the CBA's status as an established CLE sponsor. Therefore, it is the CBA's policy not to file late applications for CLE credit.

Live CLE Program Pricing

Registration fees for live CBA CLE programs shall be based on the following minimum pricing established by the CBA Board of Trustees effective January 2008:

CBA Members: \$35/credit hour

Non-Members: \$50/credit hour

For seminars involving extraordinary expenses such as speaker honorariums, speaker travel, or meals other than continental breakfast, the registration fee for the seminar shall be adjusted upwards if no sponsorship exists to underwrite the additional expense.

Registrations fees for specific programs will be as published by the CBA via its website or printed promotional material. Pro-rated fees and complimentary fees for auditing a program without claiming CLE credit are not available.

Special Pricing for Live CLE

The following discounts are approved as exceptions to the CBA's regular CLE program pricing:

CLE Season Passes

12-Hour Pass: \$270 (\$22.50 per credit hour)

6-Hour Pass: \$156 (\$26 per credit hour)

Available for purchase for a limited time each bar year by CBA members only.

CBA Young-Lawyer Member: \$15 for No Brown Bag CLEs

CBA New-Lawyer Member: Starting at \$15/hour

CBA Law-Student Member:

- Full-Day/\$50
- Half-Day/\$25
- Less than Three Hours/Free

Non-Attorney Support Staff: 50% off the applicable member or non-member attorney registration fee

Complimentary Registration: Members of the program faculty and planning committee for a particular program are invited to attend that program at no cost.

CBA Committee CLE Offer: Once per bar year, each CBA committee may offer one one-hour CLE program in place of its regular committee meeting. Members of the committee may earn one hour of CLE credit for \$10 or may opt to attend at no cost if they do not wish to claim credit.

The CLE Director shall retain the discretion to extend discounted pricing or complimentary registration to specific individuals in special circumstances. For example, an invitation for discounted or complimentary registration may be made on occasion to contributing members of the CBA or to members of board level committees.

Self-Study CLE

The CBA offers self-study CLE programming through collaboration with the Ohio Metropolitan Bar Association Consortium. Pricing for self-study programs is set by agreement of members of the consortium in consultation with a third-party provider.

Cancellations/Refunds

The CBA's default cancellation policy is as follows:

Cancellations received by noon the business day prior to the seminar will be refunded less a \$25 cancellation fee. Individuals who cancel after this time, or who are no-shows, will receive course materials in lieu of a refund.

The CBA's policy for cancellations and refunds for a specific program will be stated on the promotional material for the program. Where such language differs from the CBA's default cancellation policy, the policy stated on the promotional material is controlling.

The CLE Director and the CBA CLE staff shall retain the discretion to permit individual exceptions to the cancellation/refund policy in special circumstances such as illness or family emergency. Such discretion includes the authority to transfer an individual to another program without penalty.

Substitutions

The CBA will generally allow the substitution of one attendee for another at any time and without penalty.

Approved by the CBA Board of Trustees on January 25, 2012; Revised to include CLE Season Pass Discounts approved by CBA Board of Trustees on December 18, 2013.

Appendix 2

Cincinnati Bar Association Policy on Co-Sponsored CLE Programs

The Cincinnati Bar Association's primary method of offering continuing legal education is through sole sponsorship of programs created and presented on a voluntary basis by attorneys. Often, however, the CBA is approached with requests to co-sponsor CLE programs. In order to review these requests on a consistent basis, the CBA adopts the following policy.

- I. Co-sponsorship shall be limited to non-profit organizations whose practices and policies are consistent with the mission of the CBA. However, the CLE Advisory Committee shall have the authority to approve co-sponsorship with for-profit organizations whose practices and policies are consistent with the CBA's mission statement.
- II. All requests for co-sponsorship shall be made in writing and shall be delivered to the CLE Director of the CBA at least six months prior to the proposed program date. This period may be shortened at the discretion of the CBA's CLE Director. Each request shall include the name of the potential co-sponsor; the subject matter to be covered; the projected date and time of the seminar; the program topic(s); the names of speakers, if known; the anticipated division of responsibilities for the seminar, including financial; and a proposed budget.

Upon receipt of request, the CLE Director shall determine if the proposed seminar overlaps with the area of responsibility of a member committee of the CBA. If such overlap exists:

- A. The CLE Director shall forward all information regarding the request to the chair of the member committee concerned, who shall bring the co-sponsorship question before the members of the committee to determine if there is sufficient interest within the committee to warrant co-sponsorship. If the committee does not have such interest, it is expected that the CBA will decline co-sponsorship.
- B. If the member committee has an interest in co-sponsoring the seminar, the co-sponsorship application shall be brought before the CLE Advisory Committee, which shall consider the educational value to attorneys, inter-professional relationships, the existing CBA curriculum, timing of the seminar, development and financial obligations, and staffing requirements for the seminar in making a decision on recommending co-sponsorship.
- C. The request shall require the approval of the CLE Advisory Committee and the Executive Director of the CBA.

- D. If there is no overlapping member committee, the request should be referred to the CLE Advisory Committee as outlined above.
- III. The CBA shall exercise control of the planning and administration of a co-sponsored program.
- IV. Registration fees for a co-sponsored seminar shall be consistent with current pricing for CBA seminars for CBA members and non-members. The price for a seminar may be discounted to CBA members.

The CBA shall share equally in profits for a co-sponsored seminar after payment of direct out-of-pocket expenses. If each sponsor contributes an equal amount of staff time and volunteer effort to the project, the CBA shall waive reimbursement of its overhead contribution. However, if the CBA is required to bear a majority or more of the staff time and effort involved in conducting the seminar, the CBA shall be reimbursed for its overhead utilized in planning and conducting the seminar.

If the program shows a loss, the CBA shall, at a minimum, receive payment of all out-of-pocket expenses, unless otherwise agreed by the CLE Advisory Committee for good-cause shown by a non-profit co-sponsor.

- V. The CBA reserves the right to own solely or jointly the copyright for the written materials for a co-sponsored program.
- VI. This policy shall not preclude the CBA CLE staff from contracting for the services of experts when deemed appropriate to provide programs.
- VII. This policy shall not prevent the CBA CLE staff from listing an organization on promotional materials for a seminar if necessary to receive continuing education credit for another profession or marketing support for a fully sponsored program, provided that such listing enhances the educational value of the seminar and inter-professional relationships.
- VIII. Where a co-sponsorship request is approved, a representative from the co-sponsoring organization shall execute a CBA CLE Co-Sponsorship Agreement acknowledging the terms of the co-sponsorship and their assent to the terms of the CBA's co-sponsorship and CLE policies.
- IX. This policy shall not affect the existing arrangements the CBA has with the following organizations: Greater Cincinnati Minority Counsel Program (Annual Meeting), Federal Bar Association, GE Aviation, Hamilton County Municipal Court (Annual Judges Program), Midwest Regional Bankruptcy Seminar, Potter Stewart Inn of Court, Volunteer Lawyers for the Poor, and the Cleveland Intellectual Property Law Associations.

Approved by the Cincinnati Bar Association Board of Trustees on January 25, 2012.