

# **CLE Success Starts Here!**

## **CLE Liaison Training**



**CLE Success Starts Here! CLE Liaison Training**  
**Friday, March 16, 2018 • 11 a.m. – 1 p.m.**  
**State Bar Center, Albuquerque**

This orientation is designed to assist CLE liaisons develop and implement CLE annual institutes and other CLE programs. Various topics will be discussed including program planning, design and development best practices, budget and fiscal responsibilities and much more.

10:45 a.m.	<b>Registration</b>
11 a.m.	<b>CLE Programs: Roles and Expectations</b> <i>CLE Program Coordinator</i>
11:15 a.m.	<b>CLE Planning: Speakers</b> <i>CLE Program Coordinator</i>
11:30 a.m.	<b>CLE Planning: Agenda</b> <i>CLE Program Coordinator</i>
Noon	Lunch (provided by the Center for Legal Education)
12:15 p.m.	<b>Speakers: Materials, Fees, Travel, Oh My!</b> <i>CLE Program Coordinator</i>
12:30 p.m.	<b>Sponsorships</b>
12:45 a.m.	<b>Remaining Logistics and Q &amp; A</b> <i>CLE Program Coordinator</i>
1 p.m.	<b>Adjourn</b>

## **Center for Legal Education**

### **Who we are and what we do:**

The Center for Legal Education is a non-profit course provider and part of the New Mexico State Bar Foundation. The State Bar Foundation is also the public service arm of the State Bar. We partner with our member sections, divisions and committees and produce stand-alone programs.

No State Bar licensing fees support CLE. In addition, all net revenues help fulfill the foundation's mission of providing public service and access to justice by financially supporting the programs in the foundation.

### **Why partner with the Center for Legal Education for your CLE?**

The Center for Legal Education is an accredited course provider for New Mexico. When you partner with the Center you receive the following benefits:

- A designated point of contact to help coordinate program details
- CLE registrations received and processed by CLE staff
- Registration web link created for individual programs and posted on the State Bar website for easy access
- Advertising through *eblasts*, *eNews*, *Bar Bulletin*, social media, and news released when appropriate
- All logistics handled by CLE staff for the program including gathering and printing materials, uploading presentations to the CLE laptop, morning and afternoon refreshments and lunch, a/v equipment provided for CLE speakers, videotaping/webcasting of the CLE program, MCLE credit filings and space reserved at the State Bar Center which are included in the cost of the CLE
- Evaluations of programs are shared with the liaison or committee to determine lessons learned from the program, i.e. the content presented, individual faculty presentations, what was liked about the program overall, what needs to change, etc.

There is no charge to sections for these services. Program revenues offset the cost and support the Bar Foundation. Section members receive as much as a \$30 discount on registration fees for CLE programs that are co-sponsored by their respective sessions.

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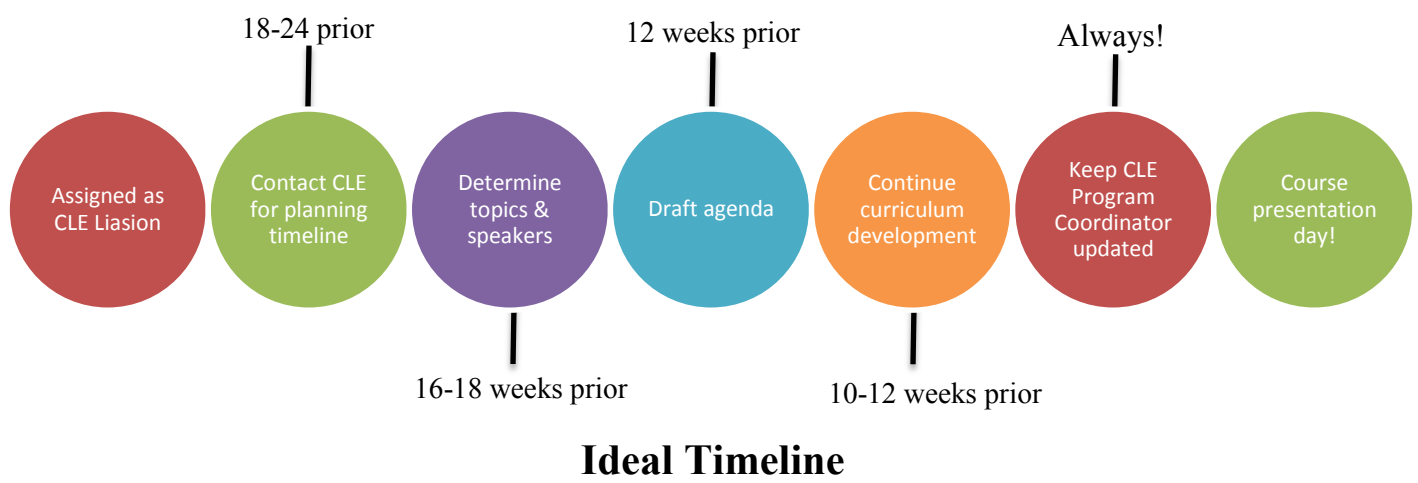
**Marketing and Development**

*(Sponsorship Inquiries)*

# Details to Achieve Successful CLE Programs

## Quick Reference Guide

- Contact the Center for Legal Education when planning begins.
- Determine topics and presenters for the program.
- Notify CLE staff of any paid speakers.
- Draft the agenda and send to CLE.
- Continue working with presenters regarding session content.
- Contact CLE with any updates or changes to the agenda prior to staff opening registration.
- Advise CLE staff of any other program or speaker needs not listed.
- Relax, CLE staff will take it from here.



# CLE SUCCESS STARTS HERE!

## CLE LIAISON TRAINING

PRESENTED BY MORGAN PETTIT AND VANNESSA SANCHEZ

CLE PROGRAM COORDINATORS

CENTER FOR LEGAL EDUCATION



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## WHAT WE DO

We are here to support you from start to finish!



As lawyers, you provide the legal substance and expertise. We handle the rest of the logistical planning.

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## ROLES AND EXPECTATIONS

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## WHAT WE EXPECT OUT OF YOUR COMMITTEE/SECTION

### Educate to competency.

Educate to strengthen the legal profession within the state of New Mexico.

Best advice to avoid legal malpractice.

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## You're now the CLE liaison. Great! Where do you begin?

Assigned  
as CLE  
Liaison

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## We are now in contact to start planning your course timeline.

You are  
assigned  
as CLE  
Liaison

Contact  
CLE for  
planning  
timeline

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## YOUR ROLE AS CLE LIAISON

- Determine topics and secure presenters for the program.



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## Ideal Timeline




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## PIT FALLS TO AVOID AS A NEW OR SEASONED LIAISON

**1. Limited communication**

**2. Day of surprises**

- Speakers, materials, etc.

**3. Assumptions**

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## OUR ROLE AS CLE COORDINATORS



Create, maintain and process registrations



Advertise and promote



Logistics (Pre and post program)

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## CLE PROGRAM

**PLANNING:**

**SPEAKERS**

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## ARRANGING FOR SPEAKERS

It is the responsibility of the CLE liaison to secure speakers.

- All speakers will receive complimentary registration for participating in the program.
- All speakers, should they need it, will receive credit for the speaking time. Speakers will receive credit for their presentation and their time prepared for it.
- Speaker order, duration, and grouping will be determined by you, your section, and/or the speakers.
- CLE will handle contacting the speakers in regards to materials and specific day of needs.
- Ensuring that speakers comply with material deadlines.

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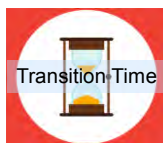
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## INDIVIDUAL/PAIRED SPEAKERS

**Most presentations only require 1 to 2 speakers.**

Here are some things to keep in mind:



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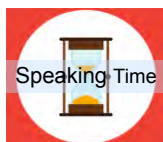
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## PANELS

**Adding additional panelists the day of the program can be problematic.**



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# CLE PROGRAM

## PLANNING: COURSES

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### YOU HAVE COURSE OPTIONS!

#### Live with Webcast



All programs are streamed via webcast to remote attendees unless specified otherwise.

#### Webinars



Recently implemented! Great option if you want to put on multiple programs.

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# CLE PROGRAM

## PLANNING: AGENDA

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## PLANNING THE AGENDA



- ✓ Review your previous years evaluations to see what your members /attendees are looking for in their education.
- ✓ Evaluations will also show if your audience prefers different presentation styles (lecture vs discussion).
- ✓ Consider past topics and evaluation results to help moving forward.

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## PLANNING THE AGENDA



- ✓ Finalize session topics with your board or planning committee.
- ✓ Research speakers to see if they are compatibles with the section's goals.
- ✓ Contact the speakers and invite them to speak at your CLE.

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## PLANNING THE AGENDA



- ✓ Once confirmed, collaborate with presenters regarding their respective sessions and relevant program materials.
- ✓ Schedule breaks that allow for smooth transitions between presentations (See agenda examples).
- ✓ If scheduling breakout sessions, keep in mind that your webcast attendees wont be able to pick and choose. We can place a conference line in one of the breakouts for webcast attendees to call into- for which you will need to designate a moderator.

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## PLANNING THE AGENDA



- ✓ Submit the final agenda with **speaker names** and **session titles** to the CLE Coordinator assigned to your program.
- ✓ In order to adequately promote the program, final agendas must be submitted **at least 12 weeks** before the program.

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## CONTINUE COMMUNICATING WITH YOUR SPEAKERS

- After confirming your speakers, explain that they will be contacted by someone from CLE regarding materials, logistics and audio visual needs.
- Continue to meet with your speakers to ensure they tailor the content of their presentations to meet your expectations of the program.
- Contact CLE with any follow up questions or information regarding your speakers or changes to the agenda.

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## SPEAKERS: MATERIALS, FEES, TRAVEL, OH MY!

- Your assigned CLE Coordinator will contact speakers and work with them directly regarding honoraria, collection of materials, important deadline dates and any other logistical needs during the CLE.
- After the program, CLE will request payment be issued to your speakers based on the pre determined honorarium.

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- Due to the high volume of presenters at the Annual Meeting - Bench and Bar Conference, the Center for Legal Education does not cover any travel related expenses or honoraria.
- It is the responsibility of the section/committee to arrange for these expenses to be paid.
- The policy is that the speakers receive two comps on the day of their session; if they are staying for the entire conference, then the speaker will need to pay the daily rate for that day.
- If there are more than two speakers, i.e moderator, liaison that makes introductions, etc., then the section can determine which ones will receive the free day of CLE.
- All other speakers, board members, and attendees from the section shall pay the full registration fee.

CLE SPONSORSHIP OPPORTUNITIES

- Sponsors are a great way for your section or committee to offer networking opportunities and also support the CLE event.
- Sponsors can support the CLE with funds towards food, materials, receptions, speaker fees, etc.



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SPONSORSHIP LEVELS



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REMAINING  
LOGISTICS

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## MATERIALS

**The Center for Legal Education will handle the printing and distribution of materials.**

- Materials are due two weeks out from the course deadline.
  - Presenter help!
- Material presentation will depend on the speakers and the amount of documents received.
- Web ready materials.




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## ADVERTISEMENTS

**The Center for Legal Education will handle advertising within the membership.**




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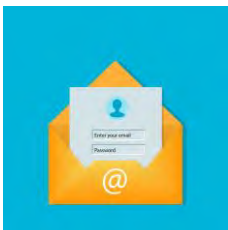
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## OTHER COMPLIMENTARY REGISTRATIONS



- ✓ Speakers
  - ✓ Moderators\*
  - ✓ Chair of the group\*\*
  - ✓ CLE Liaison (if different person from the chair)\*\*
- \*Do not receive speaking credit
- \*\*Non-transferable registrations

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## DAY OF THE PROGRAM RESPONSIBILITIES

### CLE STAFF

- ✓ Attend to the needs of the presenters.
- ✓ Ensure a/v needs are met for each presenter.
- ✓ Monitor webcast attendees and their questions.
- ✓ Food & refreshment setup.
- ✓ Provide any other on-site support needed.

### CLE LIAISON OR EMCEE

- ✓ Introduce all speakers.
- ✓ Ensure that the program stays on schedule and doesn't end short.
- ✓ Present any special recognition awards and make any special announcements.
- ✓ Help regroup after breaks.
- ✓ Preside over any annual section meetings (if the CLE liaison is also the section chair).

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## FOLLOWING THE PROGRAM CLE STAFF WILL:

- Send all attendees and speakers an electronic evaluation.
- Process any speaker reimbursements or honoraria.
- Forward the evaluation results to the section Chair and CLE Liaison for review.
- Write and send thank you cards to presenters.




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## CLE IS HERE TO SUPPORT YOU!

## QUESTIONS?

[https://www.nmbar.org/Nmstatebar/CLE/Liaison\\_Speakers/CLE\\_Liaison\\_Info.aspx](https://www.nmbar.org/Nmstatebar/CLE/Liaison_Speakers/CLE_Liaison_Info.aspx)




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## CONTACT MEMBERS OF THE CLE TEAM

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**Co-sponsor:** State Bar Practice Section Name

Program Description

**Agenda Example A**  
**Half Day CLE – 3.0 Credits**

8:45 a.m.                      Registration and Refreshments

9 a.m.                        **Session 1 (1.5 credits)**  
*One or two speakers*

10:30 a.m.                      Break (15 minutes)

10:45 a.m.                      **Session 2 (1.5 credits)**  
*One or two speakers*

12:15 p.m.                      Adjournment

**Agenda Example B**  
**Full Day CLE – 6.0 Credits**

**Co-sponsor:** State Bar Practice Section Name

Program Description

8:45 a.m.	Registration and Refreshments
9 a.m.	<b>Session 1 (1.5 credits)</b> <i>Two Speakers</i>
10:30 a.m.	Break (15 minutes)
10:45 a.m.	<b>Session 2 (1.5 credits)</b> <i>Two Speakers</i>
12:15 p.m.	Lunch (provided at the State Bar Center) (60 minutes) Section Annual Meeting (if applicable)
1:15 p.m.	<b>Session 4 (1.0 credits)</b> <i>Two Speakers or Panel</i>
2:15 p.m.	<b>Session 5 (1.0 credits)</b> <i>Two Speakers</i>
3:15 p.m.	Break (15 minutes)
3:30 p.m.	<b>Session 6 (1.0 credits)</b> <i>Two Speakers or Panel</i>
4:30 p.m.	Adjournment (add reception if applicable)

# 2018 CLE Sponsorships

**\$500**

## *Premiere Sponsorship*

- Company receives up to two (2) exhibit table(s) at sponsored CLE
- Announcement(s) promoting your company during live program
- Company full page ad will scroll on screen prior to CLE and at the end
- Company full page ad included in course materials
- Invited to attend the CLE lunch
- Social Media recognition
- Receive four (4) weeks in *eNews*

**\$250**

## *Supporting Sponsorship*

- Company receives one exhibit table at sponsored CLE
- Announcement(s) promoting your company during live program
- Company logo will scroll on screen prior to CLE and at the end
- Company half page ad included in course materials
- Invited to attend the CLE lunch
- Receive two (2) weeks in *eNews*

**\$150**

## *Partner Sponsorship*

- Company receives one exhibit table at sponsored CLE
- Company acknowledgment in live program
- Company logo will scroll on screen prior to CLE and at the end
- Invited to attend the CLE lunch



## **Wardrobe Considerations for Presenters**

All live CLE programs are videotaped and webcast to our members. Consider the following attire when presenting:

- Solid colors and Chroma rich colors work best on camera.
- Avoid large busy patterns.
- Avoid wearing white or light yellow (it makes the video “bloom”) A white or light colored shirt under a dark or solid color jacket is fine.
- Avoid Tweed or herringbone (both make the camera “moray” – constantly shimmer)
- Have a belt or pocket for the microphone belt pack to attach to.
- Remove jewelry or scarves if interfering with the microphone.
- Clothing must be sturdy enough to avoid the microphone pulling on clothing.
- Cameras on stage will be pointing down at a downward angle towards the speakers. The audience will be at a lower angle when the speakers are seated on stage. Please keep this in mind as you choose blouses and skirts.

Note: Presenters can move around and do not need to remain stationary behind the podium however they should avoid turning their back on the audience when presenting or referring to their PowerPoint slides.

## **CLE Liaison Website:**

## Legal Education Programs

### Frequently Asked Questions

1. What is the CLE revenue used for?

CLE revenue is used to cover costs for the program itself, space, meals, materials, speaker fees, videotaping/webcasting of the program and equipment. All revenue is reinvested in the CLE operating budget for future programs and into the NM Bar Foundation for public service programs.

2. Our program doesn't have many registrants yet – what can we do?

Sometimes members will register the week of the program or the day of the program. If you feel the registration numbers are extremely low, the Center can send additional *eblasts* in the form of personal invitations from the chair to the membership to encourage registration for the program.

3. Can we provide lunch during the class instructional time?

Unfortunately MCLE rules prohibit eating during a CLE program. We do provide light refreshments in the morning prior to the start of the CLE program as well as lunch and an afternoon snack. All meals provided are outside of instruction time to comply with MCLE rules. Lunches are *only* provided for full day courses.

4. Where will the program be held?

CLE programs are normally held in the State Bar auditorium or classrooms depending on the number of registrants.

5. How far in advance should a CLE program be planned?

Depending on the time of year your CLE program will take place, planning should begin at least 6 months prior.

6. Is there anything else the board or CLE Liaison need to do prior to the program?

No. Once the agenda is final and submitted to your CLE Coordinator, CLE will take care of the rest.