



**THE FLORIDA BAR'S
CONTINUING LEGAL
EDUCATION COMMITTEE**

**PROGRAM CHAIR,
STEERING COMMITTEE
& SPEAKER**

MANUAL

2007 Edition

The Continuing Legal Education Committee of the Bar has created this manual to assist you in your preparation of CLE courses. The purpose of this manual is to provide you with the information necessary to prepare and present a Florida Bar sponsored program. Should you have additional questions after reading this material, please direct your inquiries to the Bar staff liaison (referred to as the Program Administrator) assigned to assist you in creating this program, or the Assistant CLE Director.

You will find information on the following pages related to continuing legal education policies and requirements, the preparation of written course materials, and expense reimbursement. Also, suggestions have been included related to quality standards, advance level course requirements and various and sundry other matters to assist in the creation and execution of an exceptional seminar.

On behalf of The Florida Bar, we greatly appreciate your participation in the preparation and presentation of continuing legal education seminars.

Thank You !

**PROGRAM CHAIR
&
STEERING COMMITTEE**

DEFINITIONS OF FREQUENTLY USED TERMS

Program Chair - A volunteer assigned to coordinate the substance of a CLE seminar. This includes, but is not limited to, selecting topics and the course title, contacting speakers, enforcing course material deadlines, and appearing on-site at the live presentations to introduce the seminar and speakers. Some Program Chairs will choose to collect the various speakers' course materials prior to their delivery to the Bar for the purpose of quality control and to eliminate overlaps or errors. Some Program Chairs also serve as moderators, and act as discussion leaders during Q&A portions of the seminar (e.g., walking a mic to audience members asking questions).

Steering Committee - A group of volunteers who assist the Program Chair in determining course subject matter, title, topics, and speakers. Members will usually meet via conference call (or in person as possible) 4 months prior to the designated course presentation date. This will continue as necessary until the promotional materials for the course are complete, which are due 12 weeks out. Speaker selection is a difficult job for one person. Working together makes it much easier to select speakers with experience, diversity and good ratings from previous programs. One member of the Steering Committee should be appointed as the Quality Coordinator (see page 16).

Program Administrator - The Bar staff person assigned to the sponsoring Section/Division whose responsibility it is to assist the Program Chair and Steering Committee to adhere to important seminar deadlines. Duties also include the preparation of promotional brochure and Bar News ads, credit approval, site selection and arrangements, speaker letters, course material compilation, and on-site registrations.

PROMOTIONAL BROCHURE HOW-TO's

The Steering Committee determines the scope of the course, course title, topics, lecturers, and time periods, all of which is necessary to produce a complete course brochure. THE BROCHURE INFORMATION IS NEEDED AT LEAST 12 WEEKS BEFORE THE DATE OF THE FIRST COURSE PRESENTATION. It is essential to have the brochure information 3 months in advance to ensure adequate time to advertise the program to potential registrants. Seminars that miss this deadline should consider cancellation to avoid low registrations.

Simply titling each lecture is not sufficient for potential registrants to have an understanding of the program's subject matter. A general course synopsis is also helpful to describe the scope and the overall content of the program. The better informed a prospective registrant is by the brochure, the greater the possibility of excellent seminar attendance and thus a rewarding experience for the attendees, and the sponsoring section.

① **Course Title and Synopsis** - The title should be concise and to the point; it should refer specifically to main seminar topics or the practice area. For example, "Hot Topics in Mediation" is not sufficient if the seminar subject matter is specifically family mediation. The synopsis should describe the relevance and educational benefit of the course content for attorneys who may or may not have experience in the specific areas of law to be discussed.

② **Time Schedule** - Each time segment must include the following for the purpose of course credit hour approval:

- 1) Beginning and ending times; including break times and lunch
- 2) A detailed description of the topics and subtopics to be covered; and
- 3) The full name and city of the speaker(s).

③ **Speakers** - Highlight speakers who are board certified (if applicable to topic). Provide a brief biographical sketch if the program has a featured speaker.

④ **Steering Committee Members** - Provide a list of all Steering Committee members not included as speakers and the city from which they reside for inclusion on the brochure.

Course Level Classification - The course should be classified as basic, intermediate, or advanced. See page 16 for parameters defining advanced course classification in more detail. The basic course level and the word “basic” in a course title may only be used by the Young Lawyers Division.

Basic: Course designed for the practitioner with fairly limited experience in the subject area related to the course. A law survey course would be considered basic unless there are significant changes in the law. Note: The presentation of basic level courses is the responsibility of the Young Lawyers Division.

Intermediate: Course designed for the practitioner somewhat experienced in the area but not necessarily an expert. A survey course related to an area of the law in which there have been substantial changes would be considered intermediate.

Advanced: Designed for the practitioner with extensive experience in the subject matter of the course (see page 16 for more details).

⑤ **Synopsis of the Course Content** - Describes the relevance and educational benefit of the course content for attorneys who may or may not have experience in the specific areas of law to be discussed. This should be included on the brochure to draw interest to the seminar.

⑥ **Description of the Topics and Subtopics** - Some topics speak for themselves; others require some detail in the description. Give your potential attendees as much information as you can on the brochure.

ETHICS / PROFESSIONALISM / SUBSTANCE ABUSE AND MENTAL ILLNESS AWARENESS

Every Florida lawyer must obtain 5 special credit hours in the area of ethics, professionalism, substance abuse, or mental illness awareness (in any combination) during their CLER reporting period. Appropriate ethical or professionalism considerations in the form of practical examples should be included in the oral presentations and written materials of each seminar. Should you need assistance with professionalism topics related to your seminar topics, The Professionalism Center at The Florida Bar is available to assist you at 800-342-8060, extension 5747. One source for speakers in the area of substance abuse is Florida Lawyers Assistance, Inc. at 800-282-8981. To locate potential speakers related to mental health awareness, contact Angela Vickers at Angvickers@aol.com.

Q & A SEGMENTS

If your program is being audio or video taped you need to decide, in advance, how and IF you will be taking questions from the audience during the program taping. Regardless of what you decide, it is important that each speaker conclude their presentation (receive applause) before taking questions from the audience. Should you decide that the Q&A should be a part of the recorded product, The Florida Bar will supply ample hand-held microphones for questions taken from the audience. Questions asked without the use of microphones cannot be included in the recorded program.

To insure proper recording of the Q&A portion of your program, it is recommended that you either 1) have hand-held microphones walked to the person asking questions, 2) have audience members go to a standing mic in the middle of the room, or 3) address only the questions that have been written down and handed to the speaker. Regardless of which method you choose, it is the Program Chair or Moderator's responsibility to enforce that method.

A live audience enjoys the freedom to ask questions. This can be a valuable and substantive part of your program when guided by the Program Chair or a Moderator. With your help and by following the above steps, it can also be enjoyed by the audio tape audience. Should you not wish to include Q&A in the recorded product, you may elect to have your speakers stay a few minutes after their presentation to address questions outside the classroom, or take questions at the end of the seminar presentation.

QUICK TIPS - Program Chairs / Steering Committee

- ❶ Assign Program Chair ASAP, preferably 6 months before seminar date.
- ❷ Confirm the dates of your live presentation(s) with your Program Administrator.
- ❸ Form the Steering Committee and appoint Quality Coordinator. Make the opportunity to speak available and known to all qualified speakers with the goal of reflecting the diversity of the Bar.
- ❹ Don't miss the brochure information deadline. What we need from you:
 - Course Title
 - Course synopsis / description (why would someone attend)
 - Schedule of topics and speakers (include time frames)
 - List of speakers, addresses, phone numbers (e-mail if available)
 - Indication of board certified speakers if applicable to seminar topic.

Missing this deadline significantly reduces seminar advertising exposure, and as a result, course cancellation may be recommended (CLE Policy 3.12).
- ❺ Include ethics, professionalism, substance abuse, mental illness awareness and/or diversity sensitivity topics when practical.
- ❻ Determine course classification: intermediate or advanced.
- ❼ Be creative. Consider panel discussions, mock trials and mock negotiations to enhance the presentation of topics.
- ❽ Not enough material for full day? Consider a half-day program; surveys indicate preference for half-day programs (e.g. 8:30 a.m. -1:30 without break for lunch).
- ❾ Communicate course material deadlines to speakers often, especially when inviting them to speak. Speakers should be equally committed to the preparation of both their presentation and the written material. Ghost writers are encouraged for speakers too busy for both.
- ❿ Meet with your speakers to go over the course at least once before the first live presentation, even if it is the night before.

SEMINAR TIMELINE - DEADLINES

The responsibilities of the Program Chair are in **bold** type. Your Program Administrator (Bar staff member) will handle those items in *italics*.

6 months **Appointment of Program Chair by the Section's Chair or CLE Chair**

4 months **Assemble Speakers / Steering Committee members via conference call by Program Chair.**

14 weeks **Select topics and speakers; finalize course title and description.** *Letter to Program Chair reminding of deadline for receipt of brochure information (2 weeks).*

12 weeks **Brochure information due to Bar staff.** *Cancel seminar if brochure material not received. Letters sent to speakers advising them of written material deadlines.*

10 weeks **Send course materials to Quality Coordinator for review** (optional). *Brochure distributed.*

8 weeks **Speaker's course materials due to Bar staff in electronic form.** Without a complete course book the seminar should be canceled.

OPEN **Schedule final Steering Committee and Speakers' Meeting.**

_____ If you are hosting an on-going or annual program, post-presentation critique meeting should be held as soon as possible to make appropriate notes for the next year.

SPEAKERS

QUICK TIPS - Speakers

- ❶ **Meet deadlines** - Submit your written course materials on time. All course materials are compiled in a bound book for distribution to registrants. Course attendees will anticipate receiving a complete course book with the purchase of the course. Consult your Program Administrator when there are deadline difficulties. Speakers unable to meet the course material deadline should not bring their chapter to the course presentation as a hand out.
- ❷ **Confine the use of visual aids** - Do not use visual aids that have not been provided in advance for inclusion in the course book. Always alert your Program Administrator when you will require special equipment (i.e. LCD projector).
- ❸ **Be prepared** - Your lecture reaches a big audience - not the same as a courtroom. Your audience is comprised of professionals like you. Practice your presentation as often as possible.
- ❹ **Do not read your lecture** - Develop a lecture that is interesting and informative. Your colleagues expect an oration, not a recitation.
- ❺ **Be professional** - Use gender neutral language and models. Apply good judgment when using humor in your presentation to avoid stereotypes and sexist, religious, or racial references.
- ❻ **Get to the point** - Introduce your topic immediately. Use practical, “how to” examples, illustrating the principles by incorporating factual situations. Incorporate citations into your course materials; indicate the page number in the materials to help the audience follow along or take notes. Repeat citations not incorporated in materials for clarity.
- ❼ **Don’t apologize** - Apologies for your lack of expertise, or for the lack of time put into preparation, will solicit a negative response from your audience.
- ❽ When program is being taped - ALWAYS conclude your presentation, and receive applause, BEFORE taking questions from the audience. **Only questions taken from the audience with the use of a microphone will be included on the recorded program.**
- ❾ **Stop on time** - Keep the program on schedule, use only your allotted time.
- ❿ **Include ethical or professionalism** examples or comments when appropriate.

COURSE MATERIAL

Good course material contributes substantially to the effectiveness of a program. A comprehensive course book provides the course registrants pertinent information for reference well after the seminar presentation is forgotten. While the inclusion of Power Point slides in the printed material is important, slides should not be in lieu of written material. Properly researched and thoroughly prepared written material is your goal.

Format - For consistency and quality, please prepare your written material as follows:

1. Main topics, numbered with Roman numerals, should be in all caps and underlined.
2. The first word of all topics thereafter is capitalized and the remaining is in lower case.
3. Quotes over three lines should not be set out by quotation marks. Indent and center on the page.

Example:

- I. MAIN TOPIC
 - A. First Point of Main Topic
 1. (Indent first line of each paragraph and return to left-hand margin for remaining lines in each paragraph.)
 - a. (Indent first line of each paragraph and return to left-hand margin for remaining lines in each paragraph.)
 1. (Indent entire paragraph or paragraphs.)
 - (a) (Indent entire paragraph or paragraphs.)

Biographical Sketch

Please provide a brief biographical sketch for inclusion in the course material. Include only that information pertinent to the subject matter of the course. Example:

JOHN SMITH is a shareholder at Smith, Jones & Brown, P.A., in Miami where he is the head of the corporate litigation division. Mr. Smith graduated with honors from the University of Florida, 1965; and received his LL.M. in Taxation from New York University, 1968. Mr. Smith is a member of The Florida Bar, the American and Dade County bar associations, and the Academy of Florida Trial Lawyers, and also has been admitted to practice in Virginia.

Additional information may be added if germane to the subject the author is writing about: For example, board certified in the field of law.

QUICK TIPS - Course Material

- ❶ Format your course material using the following guidelines:
 - Single space text
 - 1" margins - all the way around
 - Electronic file is preferred - File size should be under 10 megs
 - Minimal formatting and page setup (do not use automatic outline function)
 - Consistent font - Times New Roman 12
 - Do not use letterhead or footers
 - Do not page number
 - Do not send .pdf format text document
- ❷ Send via email (preferred) or mail computer disk / hard copy (send in original form - Word, Word Perfect, PowerPoint, Excel).

EMAIL to the Section/Division Program Administrator
- ❸ Include a short 100-word biographical sketch with your email (preferred) or mail on computer disk. Do not send CVs or resumes.
- ❹ All attachments or photocopies MUST be camera-ready quality. DO NOT submit photocopies with black lines or edges.
- ❺ Include electronic a version of any visual aides (PowerPoint presentations) you will use for inclusion in the course book.
- ❻ There is no need to prepare a cover page or table of contents; we will do that.
- ❼ Prepare your course material in gender neutral language.
- ❽ DO NOT miss your course material deadline.

If you have any questions, please call 1-800-342-8060 extension 5618 or 5638.

APPEARING ON VIDEOTAPE

If you are a Program Chair / Moderator, it is your task to introduce speakers and keep the program on schedule. At the beginning of each taped segment, the video technician will give you a cue to start. Please wait for the cue. If you begin beforehand, that portion of the presentation will not appear on videotape. Arrange all papers and biographical sketches prior to your cue. Three time cards will be provided to cue the speaker when there are five minutes remaining, one minute remaining, and when it is time to stop.

If you are a speaker, approach the podium and begin your lecture immediately upon being introduced. Do not wait for a cue from the technician; the camera is already rolling. Gestures should be contained within camera range. If you use a visual aid, please reference the course book page number when the visual aid is being videotaped. When talking about your visual aid, be as descriptive as possible to accommodate those who only “listen” to your presentation without visuals (i.e., audio tape purchaser). If you open the floor to questions, only do so after you conclude your presentation and receive applause.

EXPENSE REIMBURSEMENT

Coach airfare, meals, lodging, and miscellaneous expenses directly related to the seminar are reimbursable for each day of presentation. Expenses that exceed the below restrictions may be reimbursed by the Section co-sponsoring the course provided such expenses have been budgeted and approved by the Section. Your Program Administrator should be consulted prior to committing to payment of such expenses. The following are the guidelines you should adhere to when seeking reimbursement for travel.

Transportation

Air Fare - Make your reservations early to obtain the lowest fare. 21-day advance purchased tickets are encouraged. Submit the original or copy of airline ticket or e-ticket which displays the ticket cost. First class airfare will not be reimbursed.

Mileage - Automobile mileage will be reimbursed at the maximum rate per mile allowed by the IRS.

Ground Transportation - The cost of ground transportation (taxicabs, airport shuttles) may be reimbursed. Please share transportation with other faculty members when possible. The one day cost of a rental car, if necessary or if more economical than cab fare, may be reimbursed. If special circumstances warrant a rental car, prior approval from the Program Administrator is needed. In addition, parking fees, tolls, etc., may be reimbursed. Include originals or copies of your invoices and receipts with reimbursement requests.

Meals

Meals will be reimbursed on an actual expenditure basis, up to \$50 per day per speaker. If more than one speaker is included on a meal charge, please list all the names and provide a receipt.

Lodging - Receipt Required (or copy)

Lodging will be reimbursed for no more than a single/regular room plus applicable taxes at the host hotel, or no more than the minimum rate secured by Bar staff. If special circumstances warrant additional nights, prior approval of the Program Administrator is required. Lodging expenses will not be reimbursed if speaking in the general vicinity of your home. Please submit the actual hotel statement or copy, not the credit card bill.

Family Members

Expenses of your spouse, children or other family members are not reimbursable.

Long Distance Telephone Charges

Long distance telephone charges directly attributable to the course are reimbursable. If you find it necessary to make a large number of long distance calls, please attach copies of your toll sheets.

Printed Materials

Speakers will not be reimbursed for photocopy expenses incurred in lieu of the timely submission of their course material. Your cooperation is appreciated as we endeavor to have a complete course book printed and bound in advance for each seminar attendee. For that reason, handouts are prohibited.

Miscellaneous

Requests for reimbursement should be submitted within two weeks of the date incurred. Requests received 30 days or more after the course presentation will not be reimbursed.

MODERATOR'S OPENING REMARKS

- ① I would like to welcome you this morning on behalf of the Continuing Legal Education Committee and the _____ (Section / Division) to our course titled _____.
- ② The credit for this course is listed inside your course materials. The Florida Bar will automatically record your CLER credit based on your registration at this seminar. Therefore, if you are unable to attend the full program, it is your responsibility to go on-line and reduce your credit using The Florida Bar's website Member Services. If you are attending with someone else's admission card, please let the registrar know so credit is awarded to the proper person.
- ③ A course evaluation form is located inside the front cover of your materials. The CLE Committee and the Section value your comments and suggestions. Please take a few minutes to complete the evaluation form and turn it in to the registrar at the conclusion of today's program. (REPEAT THROUGHOUT PROGRAM)
- ④ As a courtesy to the speakers and registrants of this program, please silence your cellular phones or pagers, or turn them off. See the registrar outside this program for messages received by the hotel operator.
- ⑤ Because this program is being taped:

 We will only take questions after each speaker has concluded his or her presentation and received their applause.

OR

 We will not be taking questions from the audience; however, each speaker will be available to you after their presentation.
- ⑥ At this time I would like to introduce our first speaker . . .
Note: Highlight board certified speakers when applicable.

QUALITY STANDARDS

Although the standards which follow cannot be applied in every conceivable case, they are guidelines from which deviation should not occur in the vast majority of cases. Moreover, they are minimum standards which should not be construed to represent the best an individual Section or Division should strive to achieve. You are encouraged to exceed these minimum standards.

Steering Committee

The Steering Committee is led by the Program Chair of the seminar. In selecting Steering Committee members, authors, and lecturers, appointing authorities should strive to select practitioners with the highest reputations for knowledge and experience in their fields and practitioners who have performed well in prior programs. In making such selection decisions, consideration should be given to bringing in qualified practitioners who have not participated in CLE programs in the past and to avoid the repeated selection of practitioners whose involvement in multiple programs may overtax their available time and energies to the detriment of quality.

A member of the Steering Committee should be specifically appointed to serve as the Quality Coordinator. Other than possibly serving as chair, the Quality Coordinator should have no other responsibilities on the Steering Committee.

Quality Coordinator

The Quality Coordinator, together with the Program Chair (if a different individual), shall have overall quality responsibility for the program. The Quality Coordinator should ensure all quality standards are met in the areas of both content and presentation.

The Quality Coordinator, together with the Steering Committee chair (if a different individual), shall ensure that the program maintains the appropriate course preparation timetable, particularly as to the timely submission of brochure information and the speaker's written course materials.

As time permits, the Quality Coordinator should review authors' materials prior to finalization and publication for overall content, including both substantive errors and omissions, and ensure that citations are accurate and that the cited cases constitute good authority for the propositions for which they are asserted. Authors continue to have primary responsibility for their work. Should the Quality Coordinator detect any problems in a particular manuscript, the Quality Coordinator should discuss the matter with the author. If the Quality Coordinator continues to perceive a problem after consulting with the author, the Quality Coordinator and Program Chair should consult with the Section / Division chair or the CLE Committee chair, as may be appropriate, for final resolution.

The Quality Coordinator should also attend at least one program presentation so as to be able to critique final presentation.

The Quality Coordinator will prepare a post-presentation critique, in writing, so that lessons learned may be passed on and used in the preparation and presentation of future programs. Particularly in the case of continuing programs, a special post-presentation critique meeting should be held, although this meeting may be held in conjunction with the organizational meetings of the subsequent program.

Written Material Standards

The written materials offered with each program are a valuable part of the course. The manuscript should be more than a “bare bones” listing of topical headings and should contain substantive material in support and amplification of the topical headings. The written material should include complete citations of authorities. The materials will be used as an office reference source and research aid both by attendees and by those who have not attended the program but purchase the written materials. Power Point slides cannot take the place of substantive written material.

The materials should adhere to the particular course classification given the program. In only the most unusual circumstances should a manuscript be an overall survey or an elementary course.

The materials should be geared to the practitioner. Therefore, it should be practical rather than theoretical.

The lecturer should present in the same manner as the written material is organized so that seminar attendees can easily follow along. Reference to page numbers is helpful if the speaker jumps around or gives comment to specific citations.

References to cites or statutes should be double checked for accuracy. If using copyrighted material of others, the speaker must obtain written permission from the copyright proprietor for reproduction and include the permission with their material when submitted to the Bar for printing.

Plagiarism is prohibited. Avoid excerpts quoted from copyrighted material if possible.

Program Workshops / Speaker Dinner

Each program should have a speakers’ program workshop. The purpose of the workshop is two-fold:

1. To provide an opportunity for the lecturers to meet and exchange views concerning the substantive content of their presentations and written material.
2. To provide an opportunity for lecturers to practice their program delivery and to be critiqued, particularly with respect to videotape performance.

Lecturer Standards

Specific examples are a highly desirable way of bringing home points in a course presentation. In offering examples, however, lecturers should refrain from including inappropriate “war stories” or other personal aggrandizement.

Professional ethics issues should be included in lectures whenever appropriate.

The use of charts and other visual aids, when appropriate, is encouraged.

ADVANCED COURSES

In addition to complying with all minimum quality standards in effect for Continuing Legal Education Courses, those labeled “advanced” must comply with the following.

1. Subject Matter

a. Substantive and update courses

The subject matter for courses dealing at the advanced level with substantive knowledge (as opposed to lawyering skills) shall be geared to the practitioner with several years of concentrated practice in the area of substantive law of the course. Generally, these courses should concentrate on a narrow and highly specialized area of law to give experienced practitioners a more sophisticated slant to their practice. Alternatively, these courses can provide updating in the more subtle methods of use of new developments.

For example, an advanced torts course designed to build substantive knowledge could deal with representing plaintiffs in toxic tort litigation. On the other hand, a refined updating course for tort attorneys could consider the impact of recent United States Supreme Court cases on defamation litigation.

b. Skills development courses

As opposed to building substantive knowledge, the skills course concentrates on using advanced substantive knowledge in an intricate planning or litigation setting. These courses should take a narrow area and teach practitioners already proficient in the practice how to upgrade their existing skills. A substantial portion of each course shall be taught in small groups with live instructors and intense, “hands-on” experience in drafting and other skills. These courses are “task-oriented” as opposed to “substance-oriented.”

For example, an advanced real estate planning course would consider preparation of federal environmental impact statements rather than simple zoning variances. A torts course would have the attorneys participate in examination of sophisticated expert witnesses, with subsequent critique by instructors.

2. Supporting Material

Supporting material prepared by the instructors should go beyond basic statutory documentation. It should include cases from other jurisdictions as well as relevant regulations.

Where copyright problems do not interfere, it should include excerpts from advanced secondary source material, sample forms and documents and a detailed bibliography of primary and secondary source materials.

3. Instructors

Instructors in advanced courses must have substantial experience in the subject matter they are teaching in order for them to maintain high levels of credibility with those attending. Instructors should have concentrated during their professional careers in the area of law covered by the course. The following types of instructors would satisfy this requirement:

- a. Attorneys who have been certified in the field in which they are lecturing;
- b. Attorneys who have practiced for five or more years primarily in the field in which they are lecturing;
- c. Judges of a trial or appellate court;
- d. Professors of law who have taught for five or more years in the field in which they are lecturing;
- e. Persons who have a total of five or more years experience in the field in which they are lecturing, gained from a combination of any of the above; or
- f. Persons who are not lawyers but who have a total of five years' experience in the field in which they are lecturing.

These categories are examples only, and should not preclude those who are highly qualified but do not fit within them from serving as instructors in appropriate instances.