Suffolk Academy of Law
Guidelines for Program Coordinators

Overview:

A core goal of Academy programs is providing actionable information and solutions the attendees can both understand and implement after the program.

Important Preparation Dates:

1). Pre-program Material: To create marketing copy we request that you provide the Academy with the following two weeks prior to the program date:

- Speaker(s) name and credentials
- Coordinator(s) name and credentials
- A high-resolution photograph if possible/desired
- The name and a description of the session [**See Program Marketing**]
- CLE credit hour breakdown

2). Program Material: To run the program, we request that speakers provide materials to the program coordinator two weeks prior to the program date. **Two weeks prior to the program date,** the program coordinator should provide to the Academy:

- A timed outline of the complete program (including breaks)
- The completed presentation materials [**See Materials Guidelines**]

3). Technology Requirements: Please advise the Academy **at least 1 week prior to the program** whether you will require any of the following:

- Power point
- Lapel microphone
- Special room setup
- Other AV needs

Please keep in mind that there are a limited number of microphones available and that seating on the stage in the Great Hall is limited. Consider splitting programs with numerous faculty into segments so that only those participating in the individual segment would be seated on the stage. This ensures there will be sufficient microphones available and that all panelists will be heard.

Coordinating a CLE Program

The Program Concept

Concepts for new programs may be proposed by Officers of the Academy, Academy Advisors, Academy Volunteers, SCBA Committee Chairs, Directors of the Bar Association, or the SCBA membership at large. On occasion, programs are also proposed by outside entities. When making a program proposal, be as specific as possible about the scope and format of the potential program, suggestions for potential presenters, and the need for a planning committee.

Programs must be approved at a meeting of Academy Officers and are subject to approval of the Board of Trustees. Many programs will go through the Curriculum Committee for further review and refinement before being sent to the Academy officers for a vote.

Planning the Program

The Program Committee

Not all programs require a program committee. However, a program committee can be helpful to refine the concept, plan and implement the program. The program committee should include at least one Officer or Advisor of the Academy to serve as the program coordinator to guide planning activities. The committee may also include other members of the Association, representatives of the court system, representatives of other educational institutions, and/or other volunteers with an interest in the topic. A diverse program committee is likely to be helpful in identifying speakers, and topics and sponsors as well as in marketing the program. The coordinator should also attempt to contact SCBA committee chairs who might be interested in the topic or program.

Don't just select a program topic; identify learning objectives. The program should have a general aim and clear objectives. Determine MCLE credit for the program: Number of credits (50 minutes = one MCLE hour; 25 minutes = 1/2 MCLE hour) and credit breakdown (professional practice, ethics, skills, law practice management, diversity or some combination thereof).

Timeline and Scheduling

After the program has been approved, the committee or coordinator should work with the Executive Director to decide upon the final date, time, and location for the program.

The time of day and length of programs are determined by both content and target audience. Academy CLE programs are held at various times during the day, including weekday evenings, short "lunch and learn" programs, afternoon matinee programs, as well as full day weekday or Saturday programs. Please be prepared to stay for the entire program.

The program coordinator's responsibilities include:

- Recruiting faculty

- Working with speakers to develop the program content

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- Following up with faculty to obtain information for publicity, including speaker photos and bios, as well as the speaker agreement

- Obtaining materials from all faculty

- Preparing (or obtaining from faculty) a timed outline for the program

- Reviewing program materials to ensure compliance with NY CLE guidelines

- Assembling program materials into a PDF package

- Sending CLE materials to Academy staff for upload to the Academy website ***at least two weeks prior to the scheduled program date***

- Recruiting sponsors for programs

- Acting as a moderator for the program, including announcing speakers and sponsors and keeping track of program time and credit hours

Faculty and Program Content

Speaker selection may be made by the coordinator and/or members of the program committee. Potential speakers include individuals practicing at or employed by governmental agencies, law schools, and/or private law firms or businesses. However, this list is not all-inclusive, and coordinators may also consider any other available sources. *All programs must include at least one speaker who is an attorney in good standing pursuant to the NYS CLE Board's rules.*

Although qualified members of the Suffolk County Bar Association should generally be considered first during the speaker selection process, coordinators are also encouraged to consider speakers who may be located outside of the County. This is especially appropriate when a potential speaker has a high level of expertise with or a fresh perspective on the program topic for which the speaker is being considered.

Unless compensation of a speaker is approved by the Academy in advance, speakers will not receive compensation for their participation at Academy programs or reimbursement of travel or other expenses. The coordinator should make the Academy's compensation policy clear to the speaker candidate during the initial interview.

If a speaker will be required to travel a significant distance in order to speak at an Academy program, the coordinator should include a request to have the Academy reimburse the speaker for his or her travel-related expenses in the program proposal so that the Academy can make a determination up front about payment for any such expenses prior to making a commitment to an individual speaker. Coordinators should give careful consideration to the effect of this expense on the program's budget when deciding whether to select a speaker who is required to travel a significant distance to the program and who seeks reimbursement.

Format

Academy programs can be presented in several different formats, including lecture, interactive panel, roundtable discussions, workshops, demonstrations or other non-traditional formats. Each program should be appropriate for the intended audience and learning objectives of the program, and should include time for questions.

Hands-on formats, such as trial advocacy and other workshops, "power writing" sessions, and computer training, are extremely useful teaching tools and can develop into popular programs.

Location

Selection of the program site should be determined by considering both the program format and the projected attendance at the program, as well as whether webcasting or recording is desired. Although most of the Academy's seminars and conferences are held in the Suffolk County Bar Association's Great Hall, some programs are more suitably held at other locations. The Great Hall holds up to 125 persons comfortably in a classroom-style format. It is sometimes preferable to hold programs at which larger audiences are expected or that will involve several break-out workshops at a hotel or other suitable locations, although budgetary issues must be considered for these programs.

Program locations other than the SCBA Center require specific prior approval from the Academy. ***Only programs held in the SCBA Great Hall can be webcast and/or recorded.***

Promptly after determining that it would be preferable to hold a program at a location other than the SCBA Center, the coordinator should make arrangements with the Dean and the Academy Executive Director to reserve a suitable location for the program.

Logistics

Refreshments - Most Academy programs are preceded by a registration period during which refreshments are typically provided: dinner fare at three-hour evening seminars, "continental" breakfasts at morning programs, sandwiches and salads at "Lunch 'n Learns," and cake and coffee at late afternoon "matinees." This registration-refreshment period provides networking opportunities for those attending the program and helps to ensure that the audience will be seated and settled prior to the start of the formal presentation.

Breaks - Program intermissions are scheduled at the discretion of the Program coordinator after consulting with the speakers. Full-day conferences require several breaks. There are usually one or two breaks during three hour evening programs. However, those participating in evening programs sometimes prefer to complete the program without taking a break and thereby end the program at an earlier hour than would otherwise have been possible. Short programs (two hours or less) usually do not require a break.

Timing of breaks should be determined in advance, particularly when a program is being webcast.

Program coordinators should take into consideration that there MUST be at least 50 minutes of instruction offered for each credit hour of the program.

Equipment/Set-up - Coordinators should advise the Academy Executive Director or her staff if special equipment (e.g., video, slides, and lapel microphones) or special seating arrangements (for either the speakers or the audience) will be required at the program.

Webcasting/Recording – Most Academy programs held in the Great Hall can be webcast live and simultaneously recorded for later purchase as audio CDs or video DVDs. The Academy Executive Director will have arranged for video and audio taping of programs that the Academy has decided should be recorded. For webcast programs, coordinators and speakers *must* adhere to pre-arranged schedule for starting, ending and break times to ensure that all participants can obtain complete CLE credits for the program.

Speaker Authorization - Coordinators should inform speakers about the need for a signed consent form. Speaker consent forms will be handed out prior to the program when held at the Bar Center. Consent forms are not necessary when programs are held off-site.

Offsite Programs – For offsite program such as, courthouses, restaurants, etc., the Academy will handle registration, generate attendance, sign-in, payment and evaluation forms for use at the program. Pre-registered attendees will be sent a link to the program materials prior to the program and CLE certificates will be handed out after the program.

Sponsorship

One of the duties of the coordinator and the program committee is to obtain sponsorship for Academy programs to cover costs of refreshments and marketing of programs. Sponsors should be sought as soon as possible so that the sponsor can obtain the full benefit of sponsorship, including the benefit of being named in all marketing materials, e-blasts and materials for the program. Sponsors will also be mentioned at the program itself and may set up a table in the room at the program to distribute information and materials and speak with attendees.

See **Sponsorship Guidelines** for further information about sponsorship.

Program Marketing

The success in attendance for Academy Programs depends in large part on joint efforts by the Academy, the Program Coordinator(s), Sponsors and the Presenters. Please make sure that all presenters, program coordinators and program committee members are well aware of the need for and expectation of their support in marketing these programs.

Academy Marketing Efforts

These are the efforts the Academy undertakes with respect to each program. If there are additional items you would like the Academy to undertake, please propose those to the Executive Director and the Academy will do the very best it can to accommodate the request.

- Inclusion in Academy email blasts to members and others who are included on the Academy email list, prior to the program (timing is dependent on the date the proposal is submitted)

- Advertise in the *"The Suffolk Lawyer"* (depending on timing of proposal/program/and publishing of TSL); publicity information must be received *at least two months prior to the program date* for possible inclusion in *The Suffolk Lawyer.*

- Include the program on the Academy's Facebook page and Twitter feed

- Include the program on the Academy CLE calendar at scba.org with a link to the program flyer

- Make flyers for upcoming programs available at the SCBA at live seminars

- Advertise in "break slides" at live seminars, when possible.

Program Coordinator, Committee Sponsor and Presenter Marketing Efforts

The following bullets outline what is expected from the Program Coordinator, Committee and individuals involved in each program:

- The Program Coordinator, Committee, Sponsor and speakers (if appropriate) are encouraged to set up a call or an email conversation and develop a marketing strategy that:

    o Identifies the target audience taking into consideration the topic and the amount of time available to market the program

    o Sets a realistic goal for the number of attendees expected to register for the program

    o Identifies potential source(s) for lists of people who may be interested in attending the program

    o Considers additional alternative places to promote the program (e.g. Facebook, LinkedIn, Twitter and other social media) and provide links in social media posts to the program flyer and registration page

- Program Coordinator/Committee Chair creates an email to be sent to relevant committee members promoting the program six and two weeks prior to the program. The subject line should call attention to the topic and that it is an Academy program. This email can be sent to the SCBA for distribution to committee members. Attach the PDF flyer to your email and include the SAL registration link in your email: https://www.scba.org/salregform.php, along with the link to register for the live webcast (if appropriate): http://scba.inreachce.com/.

- The Program Coordinator should also contact other related committee chairs and request that each send an email to their members (if you think their members would benefit from the program). Include the PDF flyer, registration link and webcast link in your email.

- Speakers and sponsors are asked to send an email with the PDF flyer and include the registration and webcast links to fellow colleagues, professional contacts, etc. and put the PDF on their firm website.

- Obtain copies of the program flyer and distribute it to colleagues at the courthouse, etc. to personally extend the invitation to attend.

- Reach out to other affiliates and/or associations.

Program Implementation

Final program preparation includes confirmation of speaker attendance, the speakers' cell phone number in case of emergency, submission of course materials to Nicolette Ghiglieri nicolette@scba.org , confirmation of program location and schedule, and determination of the anticipated number of attendees. Attendance at the program by the coordinator and members of the program committee is required. All program committee members are expected to provide any assistance that may be necessary in order to ensure the success of the program.

During introductions, the program coordinator or committee member serving as the program moderator should announce other upcoming live Academy programs and previously recorded programs that may be of particular interest to those attending the program. If applicable, the moderator should also introduce the program sponsor and thank them for their support of the program.

All Academy Officers and members of the Advisory Committee who are present at the program should help to publicize future Academy programs during their informal conversations with program attendees.

Evaluation and Follow-up

After completion of the program, the coordinator should make certain that evaluation forms have been distributed to attendees and completed. In addition to providing valuable feedback, this form provides the quantitative and qualitative data that is necessary in order for the Academy to comply with its MCLE reporting requirements and to analyze the effectiveness of programs and plan for future programs.

CLE Program Coordinator's Checklist

Four Months In Advance

- Bring idea to Curriculum Committee for approval and refinement of the program concept

- Get program date (or two or three alternative dates) from Academy Executive Director

- Reach out to desired program faculty and explain MCLE requirements, including the development of course materials

- Complete Program Proposal Form and obtain approval from Academy

- Schedule faculty planning meetings if needed

- Confirm program date

Two Months in Advance

- Develop or refine program outline and content

- Develop program description and list of faculty (with credentials) for use in publicity. Submit to Nicolette@scba.org. .

- Send confirming letters/emails to faculty, reiterating topic assignments and establishing a time line for submission of materials.

One Month in Advance

- Gather and compile program materials, including speaker biographies

- Pinpoint and correct any omissions/corrections in materials

- Develop a timed outline

- Hold final faculty meeting if needed

Two Weeks in Advance

- Submit completed program materials to Academy Office

- Follow up with speakers for completion of Speaker Authorization

- Alert Nicolette to any special requirements, e.g., room arrangement, use of A.V. equipment, etc.

One Week in Advance

- Final confirming letter/ phone call/ email to speakers

Two Days Before Program

- Confirm with Nicolette that all is in order.

Day of Program

- Arrive early to greet and explain last minute details to speakers and ensure all technology is in place.

- Introduce speaker(s) with a short bio and, if applicable, sponsors – encourage attendees to visit sponsor tables and/or speak with sponsors at the breaks

- Introduce the Academy and its functions; encourage attendees to get involved in the Academy, attend Academy meetings, and to propose programs

- Announce upcoming Academy programs and direct attendees to flyers

- Remind attendees that many programs are available on-demand online or as recordings

- Remind attendees that they must use the microphones to ask questions

- Keep track of timing to ensure that the program stays on schedule and that sufficient instruction time is allotted based on the number of credits offered for the program, particularly if the program is being webcast – *programs must begin and end on time*

- Plan to remain until program ends to thank speakers and oversee distribution of CLE certificates (when necessary).

Two Days After Program

- Send personal thank you letters to speakers.

One-to-Two Weeks Following Program

- Review program evaluation summary sent by Academy Staff.

- Plan brief, but specific, report on program for next Academy meeting.

While programs may be (and often are) developed and scheduled on a shorter time line than suggested above, general adherence to these target dates provides for more effective syllabus planning and program publicity. Moreover, complicated programs, (e.g., conferences, institutes, series) and those involving prestigious presenters definitely require a long planning period, perhaps even longer than specified above.