

# ACLEA 50th Annual Meeting



**Boston, MA | August 2-5, 2014**

**BACK TO THE FUTURE:  
CELEBRATING 50 YEARS  
OF CLE**

**Association for Continuing Legal Education**  
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St. Paul, MN 55114  
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[www.aclea.org](http://www.aclea.org)



# ACLEA 50th Annual Meeting

## Boston, MA | August 2-5 2014

### Conference at a Glance

## Saturday, August 2

7:30 a.m. – 5:00 p.m.

**Registration Open**

9:00 a.m. – 12:00 p.m.

**Boston Movie Tour** (*ticketed*)

8:00 a.m. – 3:30 p.m.

**New Member Orientation and CLE Boot Camp** (*ticketed*)

9:30 a.m. – 3:30 p.m.

**In-House Legal Training Deconstructed** (*ticketed*)

1:00 p.m. – 4:15 p.m.

**Add-On Pre-Conference Workshop** (*ticketed*)

*David Shore, PhD, Harvard University*

**The Incredible Intangibles: Leveraging Brand, Reputation, and Trust to Create a Unique and Adaptable Competitive Advantage**

4:30 p.m. – 5:30 p.m.

**SIG and Committee Chair Leadership Workshop** (*by invitation*)

6:15 p.m. – 7:30 p.m.

**Welcome Reception Featuring the Legendary ACLEA Revue with a Tribute to ACLEA's 50 years!**  
(*open to all registered attendees*)

7:30 p.m.

**First Time Attendees' Dinner** (*by invitation*)

## Sunday, August 3

7:00 a.m. – 8:00 a.m.

**Healthy Fitness Options**

8:00 a.m. – 5:00 p.m.

**Member Services/Registration Open**

8:30 a.m. – 9:30 a.m.

**SIG Meetings** — *Executive Leadership, Publications, State & Provincial Bars*

8:30 a.m. – 9:30 a.m.

**51st Mid-Year Planning Committee Meeting** (*by invitation*)

8:30 a.m. – 10:00 a.m.

**Networking Breakfast in Exhibit Hall**

9:30 a.m. – 9:45 a.m.

**President's Welcome and Opening Announcements**

9:45 a.m. – 10:00 a.m.

**ACLEA's 50th Anniversary**  
*George A. M. Herousky*

10:00 a.m. – 11:30 a.m.

**Opening Plenary — Preparing People and Organizations for the Challenge of Change: Seven Critical Success Factors**

11:45 a.m. – 1:15 p.m.

**Functional SIG Lunches** (*ticketed*) — *Executive Leadership, Marketing, Programming, Publications, Technology*

1:30 p.m. – 2:30 p.m.

**Workshops A**

- Making the Most of Your Content with the Help of a Content Strategy
- Beyond the Paycheck: Low Cost Ways to Reward & Incentivize CLE Staff
- Business as Unusual: Seminar Selection Strategies that Work

2:30 p.m. – 3:00 p.m.

**Networking Break in Exhibit Hall**

3:00 p.m. – 4:30 p.m.

**Workshops B**

- Digital Games Revolutionizing Workplace Learning?
- How to Say "No" and Save the Relationship
- Building Better Lawyers: The Twin Pillars of Lawyer Wellness and Law Practice Management
- Fewer. Shorter. Better: Effective Meetings and an Introduction to Huddles for Higher Performing Organizations

5:00 p.m. – 6:30 p.m.

**ACLEA Reception** (*open to all registered attendees*)

## Monday, August 4

7:00 a.m. – 8:00 a.m.

**Healthy Fitness Options**

8:00 a.m. – 9:00 a.m.

**Committee Meetings** (*open to attendees*)

*MCLE, Exhibits & Sponsors, Membership, Public Interest*

8:00 a.m. – 9:30 a.m.

**Networking Breakfast in Exhibit Hall**

8:00 a.m. – 3:30 p.m.

**Member Services/Registration Desk Open**

9:30 a.m. – 10:45 a.m.

**Plenary — The Future of Legal Education and What That Means for Continuing Legal Education**

11:00 a.m. – 12:00 p.m.

**Workshops C**

- Open for Business and the Business of Open
- The Best of CLE: Rapid-Fire Idea Sharing
- Best Practices: E-conferences
- Association Management: Become More Efficient in the Workplace

12:15 p.m. – 1:45 p.m.

**Organizational SIG Lunches** (*ticketed*)

*Entrepreneurs, In House/Professional Development, Law Schools, Local & Specialty Bars, Nationals, State & Provincial Bars*



2:00 p.m. – 3:00 p.m.

**Workshops D**

- Legal Publishers and Law Librarians
- ACLEA/CLEreg “Meet and Greet”
- Who Moved Their Cheese? Communicating Organizational Change to Stakeholders

3:00 p.m. – 3:30 p.m.

**Networking Break in Exhibit Hall**

Meet in lobby by 4pm

**Fenway Park Networking Event** (*ticketed*)

## Tuesday, August 5

8:00 a.m. – 5:00 p.m.

**Member Services/Registration Desk Open**

8:00 a.m. – 9:30 a.m.

**ACLEA Business Meeting & Breakfast** (*open to members*)

9:30 a.m. – 10:00 a.m.

**Networking Break in Exhibit Hall**

10:00 a.m. – 10:45 a.m.

**Exhibitor Wrap-up** (*exhibitors only*)

10:00 a.m. – 11:00 a.m.

**Workshops E**

- What’s So Difficult About Accrediting In-House Alternative Format Programming? Let Me Count the Ways!
- Online Publications —The Never-Ending Story
- Technology- Slave or Servant: Is Technology Saving Time or Costing You Time?
- Recruiting, Confirming and Hiring Speakers and Authors with Forms, Benefits, Contracts, and Communication

11:15 a.m. – 12:00 p.m.

**Workshops F**

- Copyright and Trademark Issues in Publishing for CLE Providers
- Succession Planning: Beyond Theory
- ACLEA Critical Issues Summit Group: CLE to Improve Lawyer Core Competencies
- “ACLEA’s Best” Showcase

12:15 p.m. – 1:45 p.m.

**Networking Lunch** (*ticketed*)

2:00 p.m. – 2:45 p.m.

**Workshops G**

- Copyright and Trademark Issues in Digital Media for CLE Providers
- Effective Coaching Strategies for Top Performing CLE Teams
- Partnering with Your Marketing and Business Development Colleagues: Opportunities, Challenges and Pathways to Success

3:00 p.m. – 4:30 p.m.

**Closing Plenary — It’s the ACLEY’S!!**

6:00 p.m. – 10:00 p.m.

**ACLEA Closing Reception: ACLEA Through the Decades** (*open to all registered attendees*)

### Celebrating ACLEA’s 50th Anniversary!!

Stay tuned for information on how you can submit your favorite ACLEA pictures and videos for the ACLEA 50th Anniversary booth!

#### Special Thanks to our 50th Anniversary Committee!

- Cecil Caulkins
- Lisa Deane, State Bar of AZ
- Colleen Duffy, Minnesota CLE
- Frank Harris, Minnesota CLE
- Joanne Hinnendael, New Hampshire Bar Association
- Kes Joerg, Oregon State Bar
- Donna Kramer, Sullivan & Cromwell LLP
- Pat Nester, State Bar of Texas
- Cynthia Sharp, The Sharper Lawyer
- Lisa Tischler

### Special Thanks to our 50th Annual Planning Committee!

- Joanne Hinnendael, Committee Chair, New Hampshire Bar Association
- Betsy Hults, Jones Day
- Annette Largin, CLE Alabama
- Karen Lee, Oregon State Bar
- Susan Munro, CLE Society of British Columbia
- Samantha Pringle, Cleveland Metropolitan Bar Association
- Gina Roers-Liemandt, Thomson Reuters Legal Insights and Analytics
- Cynthia Sharp, The Sharper Lawyer
- Mindy Thomas-Fulks, Tennessee Bar Association



#### American Red Cross



ACLEA is partnering with the American Red Cross to host a blood drive on **Sunday, August 3** at the 50th Annual Meeting. More information about the blood drive will be online at [www.aclea.org](http://www.aclea.org) soon.

# ACLEA 50th Annual Meeting

## Boston, MA | August 2-5, 2014

### Conference Schedule

## Saturday, August 2

7:30 a.m. - 5:00 p.m.

### Registration Open

9:00 a.m. - 12:00 p.m.

### Boston Movie Tour (ticketed)

See full description on page 9.

8:00 a.m. - 3:30 p.m.

### New Member Orientation and CLE Boot Camp (ticketed)

#### BOOT CAMP AGENDA

8:00 a.m.

### Breakfast and ACLEA Executive Committee Introductions

8:15 a.m. - 8:30 a.m.

### Welcome

*Rob Seto, CLE Society of British Columbia*

8:30 a.m. - 9:15 a.m.

### Programming Best Practices

*Karen Lee, Oregon State Bar*

*Dawn Ofner, Legal Education Society of Alberta*

Determine how to balance the unique qualities of your CLE programming with the common best practices of others.

9:15 a.m. - 9:45 a.m.

### What's a Credit and Why Should You Care?

*Gina Roers-Liemandt, Thompson Reuters*

Gain an understanding of the MCLE application and recording process even if you don't work directly with accrediting agencies.

9:45 a.m. - 10:15 a.m.

### Top Ten Tips for Working with Speakers

*Mindy Thomas Fulks, Tennessee Bar Association*

Learn ten helpful tips on how to work with speakers, including best practices, pitfalls to avoid, and how to keep a good relationship with your volunteers.

10:15 a.m. - 10:30 a.m. Break

10:30 a.m. - 11:15 a.m.

### Negotiation Strategies for CLE Professionals

*Marty Latz, Latz Negotiations Institute*

Gain insight into proven strategies that will help you develop and refine your negotiation skills to achieve success with your programming and publications goals.

11:15 a.m. - 12:00 p.m.

### Technology and CLE

*Peter Berge, Minnesota CLE*

*Lucas Boling, The Missouri Bar*

Learn how to maximize technology in your daily operations, programming, marketing, and website presence.

12:00 p.m. - 1:00 p.m.

### Lunch (included for boot camp attendees)

1:00 p.m. - 1:30 p.m.

### Technology and Publications - So Much Information and So Many Choices!

*Kristin Huotari, Wisconsin Bar*

Discover the latest trends in online publication delivery and some key pointers that you'll need if you're joining an existing publications department or starting to publish online.

1:30 p.m. - 2:15 p.m.

### Back to Basics: Marketing

*Josh Getman, MCLE New England*

2:15 p.m. - 2:30 p.m. Break

2:30 p.m. - 3:10 p.m.

### Roundtable Discussions

#### ■ Publications

*Diane Morrison, State Bar of Texas*

Discover ways to produce, edit, market, and work with vendors to publish CLE even if you don't have a publications department.

#### ■ Hot topics

*Rob Seto, CLE Society of British Columbia*

Exchange ideas, problems, frustrations and solutions on the latest topics in moderated format.

#### ■ In-House/Professional Development

*Betsy Hults, Jones Day,*

*Bernadette Lawson, Shook, Hardy & Bacon L.L.P.*

Gain an understanding of main challenges unique to in-house CLE, including how to work with external CLE providers.

#### ■ Technology

*Peter Berge, Minnesota CLE*

*Lucas Boling, The Missouri Bar*

Join a question and answer discussion addressing challenges and ideas on the latest technology issues.

3:15 p.m. - 3:30 p.m.

### The Voices of Experience (Boot Camp Speakers)

3:30 p.m. Adjourn

#### End of Boot Camp Agenda

9:30 a.m. - 3:30 p.m.

### In-House Legal Training Deconstructed (ticketed)

#### IN-HOUSE AGENDA

9:30 a.m. - 9:40 a.m.

### Registration and Welcome

*Betsy Hults, Jones Day*

9:40 a.m. - 10:00 a.m.

### The Stork

*Jan F. Majewski, Holland & Knight LLP*

Discuss the many sources from which in-house program ideas come, how they occur, and special considerations applied based on their source.

10:00 a.m. - 10:55 a.m.

**The Accordion — A Systematic Approach to Program Development**

*Roger B. Curlin, III, Alliance CLE*

*Wyndolyn Tongee, Norton Rose Fulbright*

Discover best practices in program communication, deadlines, and variables to create a system for bringing program ideas to fruition.

11:00 a.m. - 11:45 a.m.

**The Nightmares**

*Stephanie Ball, Brownstein Hyatt Farber Schreck*

*Betsy Hulst, Jones Day*

Learn troubleshooting measures to handle the variety of challenges unique to in-house CLE.

11:45 a.m. - 1:00 p.m.

**Networking Lunch** (included for In-House attendees)

1:00 p.m. - 1:40 p.m.

**The Audience**

*Donna M. Kramer, Sullivan & Cromwell LLP*

*Stuart Teicher, CLE Netshows*

Gain an understanding of audience issues in attracting, engaging, and satisfying — focusing on issues from motivating attorneys to providing an audience for internal training.

1:40 p.m. - 2:15 p.m.

**The Cast**

*Erica H. Larios, Wilson Sonsini Goodrich & Rosati*

*Bernadette Lawson, Shook, Hardy & Bacon LLP*

Discuss best practices when interacting with faculty and program planners, including check lists, carrots, booster seats, communications, day of activities, and more.

2:15 p.m. - 3:00 p.m.

**The Show**

*Adrienne Hope, Fox Rothschild LLP*

*Monica S. Mosley, Sutherland Asbill & Brennan LLP*

Learn best practices before, during, and after the program to create an awesome event, including dealing with what you can (and can't) get away with in your firm's culture.

3:00 p.m. - 3:15 p.m.

**The Mirror**

*Adrienne Hope, Fox Rothschild LLP*

*Monica S. Mosley, Sutherland Asbill & Brennan LLP*

Learn how to evaluate your program from how to design a great evaluation form to what to do with that knowledge.

3:15 p.m.

**Conclusion / Q&A with Faculty**

1:00 p.m. - 4:15 p.m.

**Add-On Pre-Conference Workshop** (ticketed)

**The Incredible Intangibles: Leveraging Brand, Reputation, and Trust to Create a Unique and Adaptable Competitive Advantage**

*David Shore, PhD, Harvard University*

This practical session moves beyond simply documenting the value of brand, reputation, and trust-building to focus on how to build your organization's capacity for trust. This practical

session moves beyond simply documenting the value of brand, reputation, and trust-building to focus on how to build your organization's capacity for trust and trustworthiness, and how your organization can translate that capacity into a trusted reputation and brand.

4:30 p.m. - 5:30 p.m.

**SIG and Committee Chair Leadership Workshop**  
(by invitation only)

6:15 p.m. - 7:30 p.m.

**Welcome Reception Featuring the Legendary ACLEA Revue with a Tribute to ACLEA's 50 years!**

(open to all registered attendees)

See full description on page 9.

7:30 p.m.

**First Time Attendees' Dinner** (by invitation)

See full description on page 9.

## Sunday, August 3

7:00 a.m. - 8:00 a.m.

**Healthy Fitness Options**

Join your ACLEA friends for some exercise, fun and networking with one of three healthy fitness options:

■ **Zumba**

*Pam Wilson, State Bar of California*

Jump start your day with this easy to follow, Latin-inspired, calorie-burning dance fitness party.

■ **Walking**

*Joanne Hinnendael, New Hampshire Bar Association*

Take a leisurely walk along Commonwealth Avenue, around the Boston Public Gardens and through Boston Common.

■ **Running**

*Dave Will, Peach New Media*

Wake up with a refreshing run through Boston's Back Bay neighborhood and along the Charles River.

8:00 a.m. - 5:00 p.m.

**Member Services/Registration Open**

8:30 a.m. - 9:30 a.m.

**SIG Meetings**

Start the day by bringing your favorite morning beverage to a SIG meeting.

■ **Executive Leadership**

■ **Publications**

■ **State & Provincial Bars** (must be a SIG member)

8:30 a.m. - 9:30 a.m.

**51st Mid-Year Planning Committee Meeting** (by invitation)

8:30 a.m. - 9:30 a.m.

**Networking Breakfast in Exhibit Hall**

# ACLEA 50th Annual Meeting

## Boston, MA | August 2-5, 2014

### Sunday, August 3 (continued)

9:30 a.m. - 9:45 a.m.

#### **President's Welcome and Opening Announcements**

9:45 a.m. - 10:00 a.m.

#### **ACLEA's 50th Anniversary — The Way We Were**

*George A. M. Heroux*

How a small group of poorly paid but enthusiastic continuing legal education professionals shared experiences and innovations for the betterment of all expanding the quality of CLE throughout the country.

10:00 a.m. - 11:30 a.m.

#### **Opening Plenary — Preparing People and Organizations for the Challenge of Change: Seven Critical Success Factors**

*David Shore, PhD, Harvard University*

Gain an understanding of practical strategies for managing change, with a particular emphasis on overcoming resistance to change.

11:45 a.m. - 1:15 p.m.

#### **Functional SIG Lunches (ticketed)**

##### ■ **Executive Leadership**

*Jennifer Dabson, American University Washington College of Law*

*Kathryn Bellman, Nebraska State Bar Association*

Join a lively discussion of what is next on the horizon for CLE provision, and, then – back to the future – what past trends did you spot that did or did not pan out?

##### ■ **Marketing — Conventional Marketing, New Marketing, Social Marketing, Un-Marketing: Please Someone Tell Us What Works!**

To segment or not to segment? To tweet or not to tweet? QR Codes—helpful or passé? Brochures and catalogs, both or neither? Join peers that share your passion for (or anxiety about) all things marketing for a spirited discussion of this, and more.

##### ■ **Programming — Listening to the “Legal Pulse”**

*Sigalle Barness, Lawline.com*

*Adrienne Hope, Fox Fothschild LLP*

It's imperative to stay attuned to the legal market regardless what side of programming you come from. This luncheon will invoke an interactive discussion relating to how various organizations determine program needs, identify current trends and how we can stay two steps ahead of the industry to provide the best educational content to our audiences.

##### ■ **Publications — Back to the Basics**

*Daniel J. McMahon, New York State Bar Association*

*Dawn McKnight, Colorado Bar Association*

Before deciding what e-book format(s) to publish in, you need a book. Let's revisit our production procedures.

##### ■ **Technology — Using Website and Social Media to Drive Sales**

Discuss some of the ways to get potential customers to come to your website on a regular basis, including ways to implement these ideas.

1:30 p.m. - 2:30 p.m.

#### **WORKSHOPS A**

##### ■ **Making the Most of Your Content with the Help of a Content Strategy**

*Laura Selby, CLEBC*

Hear about CLEBC's experience in developing a content strategy to help unlock the potential of content through re-use, and work toward developing new or alternative revenue streams, becoming more efficient in content creation, and preparing content for the future.

##### ■ **Beyond the Paycheck: Low Cost Ways to Reward and Incentivize CLE Staff**

*Cynthia Sharp, Esquire, The Sharper Lawyer*

*Herb Rubenstein, Esquire, Leadership for Lawyers*

Learn at least TWENTY no cost/low cost ways to show meaningful appreciation to staff and leave equipped to implement creative and imaginative employee appreciation ideas.

##### ■ **Business as Usual — Seminar Selection Strategies that Work**

*Terry Burnett, South Carolina Bar*

*Rob Seto, CLE Society of British Columbia*

Discover techniques and strategies to help funnel new program ideas, adding a twist of fun, and gaining a new approach the business of seminars.

2:30 p.m. - 3:00 p.m.

#### **Networking Break in Exhibit Hall**

3:00 p.m. - 4:30 p.m.

#### **WORKSHOPS B**

##### ■ **Digital Games Revolutionizing Workplace Learning?**

*Joe LeBas, True Office*

Join us for a thoughtful discussion of the various decision points, deployment opportunities, and expected benefits of using game mechanics to facilitate better learning experiences for our audiences.

##### ■ **How to Say “No” and Save the Relationship**

*Martin E. Latz, Latz Negotiation Institute*

National negotiations expert Marty Latz will provide you with techniques for delivering a “no” message that will also help you maintain a positive position with the other party.

##### ■ **Building Better Lawyers: The Twin Pillars of Lawyer Wellness and Law Practice Management**

*Helene Breene, Bar Association of Queensland*

*Ann-Maree David, College of Law Queensland*

*Una Doyle, Law Society of New South Wales*

*Dick Edwards, New Zealand Law Society, CLE*

Get a snapshot of some innovative educational programs and new approaches for qualifying CLE activities and come away inspired and armed with a host of new program ideas.

##### ■ **Fewer, Shorter, Better: Effective Meetings and an Introduction to Huddles for Higher Performing Orgs**

*David Shore, PhD, Harvard University*

On an organizational level, get an introductory framework and processes to save managers and executives one day a week, one week a month, and one month a year in unnecessary and unproductive meetings.



5:00 p.m. - 6:30 p.m.

**ACLEA Reception** (open to all registered attendees)  
See full description on page 9.

## Monday, August 4

7:00 a.m. - 8:00 a.m.

### Healthy Fitness Options

Join your ACLEA friends for some exercise, fun and networking with one of three healthy fitness options:

#### ■ Yoga

*Bernadette Lawson, Shook, Hardy & Bacon LLP*

Join us as we focus on breathing and practice calming poses.

#### ■ Walking

*Joanne Hinnendael, New Hampshire Bar Assoc.*

Take a leisurely walk along Commonwealth Avenue, around the Boston Public Gardens and through Boston Common.

#### ■ Running

*Dave Will, Peach New Media*

Start your day with a refreshing run through Boston's Back Bay neighborhood and along the Charles River.

8:00 a.m. - 9:00 a.m.

### Committee Meetings

 (open to all registered attendees)

Drop by one of these committee meetings to learn more about them, including volunteer opportunities!

#### ■ MCLE

#### ■ Exhibits & Sponsors

#### ■ Membership

#### ■ Public Interest Committee Meeting

8:00 a.m. - 9:30 a.m.

### Networking Breakfast in Exhibit Hall

8:00 a.m. - 3:30 p.m.

### Member Services/Registration Desk Open

9:30 a.m. - 10:45 a.m.

### Plenary — The Future of Legal Education and What That Means for Continuing Legal Education

*Moderator: Russell F. Hilliard, Upton & Hatfield, LLP*

*Dana M. Hrelac, Horton, Shields & Knox, PC*

*Una Doyle, Law Society of New South Wales*

*Alan Treleaven, Law Society of British Columbia*

*Richard Campbell, Campbell Campbell Edwards & Conroy*

*Thomas Lyons, Strauss, Factor, Laing, & Lyons*

Members of the ABA Task Force, and international providers of CLE, will review and comment on the ABA's Task Force on the Future of Legal Education report and its recommendations, with particular reflection on the impact such changes may have on the CLE in the future.

11:00 a.m. - 12:00 p.m.

### WORKSHOPS C

#### ■ Open for Business and the Business of Open

*Sarah Glassmeyer, CALI*

Learn how CLE organizations can use open law, open access, open source, and open educational resources and integrate them into our products without giving away the store.

#### ■ The Best of CLE: Rapid-Fire Idea Sharing

Hear great ideas and lessons learned from 15 of your ACLEA colleagues in the world of CLE, then seek out the presenters from whom you want to learn more and take a deeper dive with them about their idea!

#### ■ Best Practices: E-conferences

*BJ Bates, BeaconLive*

Discover best practices for teleconferences, webinars, webcasts, and on demand video replays. Learn tips to help your speakers with both on and off camera presentations.

#### ■ Association Management: Become More Efficient in the Workplace

*David Ewald, Ewald Consulting*

*Laurie Krueger, Ewald Consulting*

Discuss the best methods to serve the different interests at play in any organization at the same time, while respecting positions, juggling priorities and allocating resources.

12:15 p.m. - 1:45 p.m.

### Organizational SIG Lunches (ticketed)

#### ■ Entrepreneurs

*Cynthia Sharp, The Sharper Lawyer*

*Carole Levitt, Internet for Lawyers*

You're invited to an open dialogue about enhancing ACLEA's relationships with our vendor community. Develop new ideas geared to improving the Entrepreneurs Hall/Showcase and general conference experience for the exhibitors.

#### ■ In-House/Professional Development

*Betsy Hulst, Jones Day*

*Bernadette Lawson, Shook, Hardy & Bacon LLP*

*Monica S. Mosley, Sutherland Asbill & Brennan LLP*

Join an open discussion talking about what's hot, what's trending in CLE, and how you're solving problems to make it happen!

#### ■ Law Schools

*Jennifer Dabson, American Univ. Washington College of Law*

*Heather Gore Liddell, Osgoode Hall Law School*

Discuss topics will include social media and marketing, limits and conflicts with University wide initiatives, strategic plans for developing alumni roster using linked in, etc.

#### ■ Local & Specialty Bars

*Susan Blair, Nashville Bar Association*

*Samantha Pringle, Cleveland Metropolitan Bar Association*

Come prepared to share a tip or strategy trick that you use in your shop in this lively discussion of the successes and challenges you've faced in your shop.

# ACLEA 50th Annual Meeting

## Boston, MA | August 2-5, 2014

### Monday, August 4 (continued)

#### ■ Nationals

*Matt Mickelson, National Business Institute*

Do you think it would be fun to build a CLE organization from the ground up? If so, come to the nationals lunch where in one short hour we will build a CLE startup!!!

#### ■ State & Provincial Bars

*Karen Lee, Oregon State Bar*

*Dawn Ofner, Legal Education Society of Alberta*

Join us for a networking lunch and open discussion with fellow SIG members.

2:00 p.m. - 3:00 p.m.

#### WORKSHOPS D

#### ■ Legal Publishers and Law Librarians

*Maryanne Jensen, Massachusetts CLE*

*Mary Ann Neary, Boston College*

*Amanda Merk, AccuFile*

Join two law librarians and a legal publisher as they share their ideas about how to work together, support each other, and collaborate to further the common goal of keeping the legal profession informed.

#### ■ ACLEA/CLEreg “Meet and Greet”

Take a break from the instructional sessions for an informal opportunity to learn more about the MCLE administrators and staff in jurisdictions where you apply for MCLE credit. This is a great way for face-to-face communications and Q&A.

#### ■ Who Moved Their Cheese? Communicating Organizational Change to Stakeholders

*Moderator: Pamela Wilson, State Bar of California*

*Kathryn Bellman, Nebraska State Bar Association*

*Megan McNally, Washington State Bar Association*

Hear how three organizations managed the message when informing stakeholders of changes that would affect not only CLE but also broader organizational expectations as well.

3:00 p.m. - 3:30 p.m.

#### Networking Break in Exhibit Hall

Meet in lobby by 4:00 p.m.

**Fenway Park Networking Event** (ticketed)

See full description on page 9.

### Tuesday, August 5

8:00 a.m. - 5:00 p.m.

**Member Services/Registration Desk Open**

8:00 a.m. - 9:30 a.m.

**ACLEA Business Meeting & Breakfast**

(open to ACLEA members)

9:30 a.m. - 10:00 a.m.

**Networking Break in Exhibit Hall**

10:00 a.m. - 10:45 a.m.

**Exhibitor Wrap-up** (exhibitors only)

10:00 a.m. - 11:00 a.m.

#### WORKSHOPS E

#### ■ What's So Difficult About Accrediting In-House Alternative Format Programming? Let Me Count the Ways!

*Gina Roers-Liemandt, Thomson Reuters*

Get an overview of the differences in the rules and learn tips to assist in gaining this challenging in-house credit type for your attorneys.

#### ■ Online Publications — The Never-Ending Story

*Linda Russell, CEB*

*Holly Garland Langworthy, Minnesota CLE*

*Kristin Huotari, PINNACLE (Wisconsin)*

Three experienced legal editors and publishers compare their approaches to online publishing and bring us up to the date on the latest developments.

#### ■ Technology — Slave or Servant: Is Technology Saving Time or Costing You Time?

*Paul Unger, Affinity Consulting Group*

Discover how to manage your daily tasks, as well as learn how technology can help you improve communication and even help you achieve your personal professional goals.

#### ■ Recruiting, Confirming and Hiring Speakers and Authors with Forms, Benefits, Contracts, and Communication

*Moderator: Carol Levitt, Internet for Lawyers*

*Mary McDonald, Texas Bar CLE*

*Daniel J. McCarroll, KC MBA UMKC CLE*

Learn how to seek out the best speakers for your needs and find out why using a contract is a smart way to help avoid misunderstandings between CLE organizations and their speakers, writers, and vendors.

11:15 a.m. - 12:00 p.m.

#### WORKSHOPS F

#### ■ Copyright and Trademark Issues in Publishing for CLE Providers

*Liz Janicki, West Academic Publishing*

Learn how to guide speakers and authors who are looking for answers to their trademark and copyright questions as you gain an understanding of your obligations as the provider of CLE.

#### ■ Succession Planning: Beyond Theory

*Jennifer Flynn, Legal Education Society of Alberta*

Learn the must-have elements of an ideal plan and hear what actually worked best (and what didn't) when implementing such a plan in the CLE context. Leave with a solid understanding of succession best practices and candid practical tips.

#### ■ ACLEA Critical Issues Summit Group: CLE to Improve Lawyer Core Competencies

*Karen Litscher-Johnson, Illinois CLE*

*Julia Orzeske, Indiana Commission for CLE*

*Dan Levering, PACLE Board*

Join a discussion led by CLEreg administrators from Illinois, Indiana, and Pennsylvania about the evolution of and prognosis for competency-based learning and gain a better understanding of the similarities of course offerings to improve lawyers skills to practice.



■ **“ACLEA’s Best” Showcase**

Visit with the individual winners of ACLEA’s Best Awards in an exhibit hall-like session to learn more about this year’s best programs, publications, marketing, technology, and more!

12:15 p.m. - 1:45 p.m.

**Networking Lunch** (*ticketed*)

2:00 p.m. - 2:45 p.m.

**WORKSHOPS G**

■ **Copyright and Trademark Issues in Digital Media for CLE Providers**

*Liz Janicki, West Academic Publishing*

Learn about licensing and permissions for the use of digital content, the Digital Millennium Copyright Act, and DMCA violations, the use of Cease and Desist letters and other methods to take down infringing content from Pirates (not of the Caribbean).

■ **Effective Coaching Strategies for Top Performing CLE Teams**

*Cynthia Sharp, The Sharper Lawyer*

Understand the basic skills to enable someone to coach herself or himself and to ultimately pass the knowledge and tools to team members with heavy emphasis on setting and achieving strategically defined goals as well as accountability measures.

■ **Partnering with your Marketing and Business Development Colleagues: Opportunities, Challenges and Pathways to Success**

*Heather V. Edes, Sullivan & Worcester LLP*

*Leah E. Schloss, Sullivan & Worcester LLP*

Review the number of initiatives that are most successful when marketing and professional development teams build on each other’s expertise, examine some of the obstacles to effective collaboration, and share strategies and tactics for obliterating – or at least minimizing the impact of – any such obstacles.

3:00 p.m. - 4:30 p.m.

**Closing Plenary — It’s the ACLEY’S!!**

Join us as ACLEA members tell us the good, the bad, and the intriguing about the best business, management, and personal books they’ve recently read and possibly take home a copy of each book as an “award recipient” yourself!

6:00 p.m. - 10:00 p.m.

**ACLEA Closing Reception: ACLEA Through the Decades** (*open to all registered attendees*)

*See full description at right.*

## Networking Events

**SATURDAY, AUGUST 2, 2014**

9:00 a.m. – 12:00 p.m.

**Boston Movie Tour** (*ticketed event*)

Take the ultimate tour of Beantown! More than your average Boston sightseeing expedition, this unique TV and movie bus tour is led by local actors who will provide behind-the-scenes filming details and endless entertainment knowledge. You’ll see filming locations from TV shows and movies such as *The Departed*, *Good Will Hunting*, *Cheers*, *The Town*, *Legally Blonde*, *Ally McBeal*, *Mystic River*, *Boston Legal*, *Knight & Day*, *21*, *Fever Pitch*, *Gone Baby Gone* and more!

6:15 p.m. – 7:30 p.m.

**Welcome Reception Featuring the 50th Anniversary Musical Revue!** (*open to all registered attendees*)

Don’t miss your tuneful and fearless CLE colleagues celebrating our unique profession in an unforgettable (and short) one-time-only performance. Guaranteed to make you “Happy” as you embark on your evening activities.

7:30 p.m.

**First Time Attendees’ Dinner** (*ticketed event by invitation*)

This is a great opportunity for First Time Attendees to get to know fellow First Time attendees in an informal and relaxed environment.

**SUNDAY, AUGUST 2, 2014**

5:00 p.m. – 6:30 p.m.

**ACLEA Reception** (*open to all registered attendees*)

Join your ACLEA colleagues at the Annual Reception. Tickets for registrants are included in your registration fee but you must RSVP. Tickets for guests are \$30 USD per person. Please make your required reservations on your registration form.

**MONDAY, AUGUST 4, 2014**

Meet in lobby by 4pm

**Fenway Park Networking Event** (*ticketed event*)

“America’s Most Beloved Ballpark,” Fenway Park, is a place where dreams are made, traditions are celebrated and baseball is forever. Uniquely nestled in the city of Boston, see the home of Red Sox Legends, Williams, Yaz, Fisk and Rice. Visit Pesky’s Pole and sit atop the world famous Green Monster which stands 37 feet 2 inches high overlooking leftfield. Experienced tour guides will provide an engaging, one-hour walking tour of Fenway Park. A private networking reception including food and beverage on the first base deck will follow the tour.

**TUESDAY, AUGUST 5, 2014**

6:00 p.m. – 10:00 p.m.

**ACLEA Closing Reception: ACLEA Through the Decades**

(*open to all registered attendees*)

Celebrate ACLEA’s 50th Annual Meeting through the ages! Get psychedelic in the 1960s, show off your disco moves in the 1970s and step back in time to the totally rad 1980s. Themed attire welcomed!

# ACLEA 50th Annual Meeting

## Boston, MA | August 2-5, 2014

### General Information

For up-to-date meeting information please visit us online at [www.aclea.org](http://www.aclea.org)

## Registration

The program registration fee includes conference materials, admission to Sunday, Monday, and Tuesday sessions, the business meeting and breakfast, the Saturday welcome reception, Sunday evening reception and the Tuesday night special event. Saturday's CLE Boot Camp, the In-House add-on workshop, pre-conference workshop, and all optional lunches and tours are separately priced. We must receive payment for optional sessions, lunches, and tours in advance of the conference to guarantee your reservation. Unless otherwise stated, all special event and tour fee payments are nonrefundable after July 1, 2014.

## Spouse/Guest Fee

ACLEA has a spouse/guest fee for attendance at ACLEA meetings by those not eligible for ACLEA membership. This is a restricted fee intended for family members. Any spouse/guest who is interested in networking with other spouses/guests as well as friends in ACLEA, may pay a fee to cover the costs of food and beverage and attendance at some meetings. This \$145 USD fee includes the Saturday welcome reception, continental breakfasts, business meeting breakfast, exhibit hall mixer, morning and afternoon breaks, and attendance at any sessions on topics that may be of interest, but does not include conference materials, luncheons, or optional events. This benefit is extended only to those spouse/ guests who are not eligible for ACLEA membership. ANYONE CONSULTING WITH, OR EMPLOYED BY, AN ORGANIZATION ELIGIBLE FOR MEMBERSHIP IN ACLEA IS NOT ELIGIBLE FOR THIS FEE.

## Hotel Information

Our host hotel is the Westin Copley Place in Boston, Massachusetts. ACLEA has secured a special room rate of \$209.00 USD per night for single/double available until July 8, 2014 or until the room block is exhausted, whichever comes first.

**NOTE:** ACLEA has obtained this room rate by contracting a total meeting package at the Westin Copley Place. ACLEA must meet certain minimum food & beverage and hotel room pickup requirements or ACLEA will face attrition and/or meeting room rental. In order for ACLEA to continue to provide a reasonable registration fee, we need your help. Please take advantage of the room rate we have negotiated and make your reservation by contacting:



**Westin Copley Place**  
10 Huntington Ave  
Boston, MA 02116  
Phone (888) 627-7216

## Transportation

Getting to the Westin Copley Place

We recommend that you fly into Boston Logan International Airport, which is an approximate 5 mile drive from the hotel (estimated taxi fare is \$35.00 one-way.)

### By Car

If you're planning to drive in, the Westin Copley Place has convenient valet parking facilities available for \$49 per day.

For driving directions and mass transit options visit:

<http://www.starwoodhotels.com/westin/property/area/index.html?propertyID=1035>.

## Cancellation Policy

All special event & tour fee payments are nonrefundable after July 1, 2014. Registration refunds, less a \$50 USD processing fee, will be given to registrants who cancel by 5:00 p.m. July 1, 2014. No refunds or transfers will be granted thereafter.

### Questions? Contact Us!

p: (651) 366-6082 | f: (651) 290-2266

[aclea@aclea.org](mailto:aclea@aclea.org) | [www.aclea.org](http://www.aclea.org)



# REGISTRATION FORM

ACLEA 50th Annual Meeting | Boston, MA | August 2-5, 2014

## ATTENDEE INFORMATION

Name: \_\_\_\_\_  
Organization: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
City/State/Province/Zip: \_\_\_\_\_  
\_\_\_\_\_  
Phone: (\_\_\_\_\_) \_\_\_\_\_  
Fax: (\_\_\_\_\_) \_\_\_\_\_  
Email: \_\_\_\_\_  
Spouse/Guest: \_\_\_\_\_  
Special Dietary Needs: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## CONFERENCE MATERIALS

Please indicate the format in which you would like to receive conference materials. Either USB or printed materials are included with your registration fee. If you wish to receive BOTH USB and printed materials, please purchase from the optional tickets below. PLEASE NOTE printed materials are only available if ordered **BEFORE July 1, 2014**.

☐ USB ☐ Printed ☐ Both USB & Printed

## REGISTRATION

### Early Bird (on or before July 1, 2014)

☐ Member - \$645 ☐ Non-Member - \$845 ☐ Spouse/Guest - \$145

### Regular (after July 1, 2014)

☐ Member - \$695 ☐ Non-Member - \$895 ☐ Spouse/Guest - \$195

## OPTIONAL EDUCATION PROGRAMS (Pre-Registration Required)

### Saturday, August 2, 2014

CLE Boot Camp ☐ Member - \$145 ☐ Non-Member - \$195

In-House Training ☐ Member - \$145 ☐ Non-Member - \$195

Add on Workshop: (The Incredible Intangibles | David Shore)

☐ Member - \$145 ☐ Non-Member - \$195

## SIG LUNCHEONS (Pre-Registration Required)

### Sunday, August 3, 2014 | 11:45 AM - 1:15 PM

(Open to All Functional SIG Members)

☐ Executive Leadership - \$30 ☐ Marketing - \$30 ☐ Programming - \$30  
☐ Publications - \$30 ☐ Technology - \$30

## SIG LUNCHEONS (Pre-Registration Required)

### Monday, August 4, 2014 | 12:15 PM - 1:45 PM

(Open to Respective Organizational SIG Members ONLY)

☐ Entrepreneurs - \$31 ☐ In-House - \$31 ☐ Law School - \$31  
☐ Local & Specialty Bars - \$31 ☐ Nationals - \$31  
☐ State/Provincial Bars - \$31

### Tuesday, August 5, 2014 | 12:15 PM - 1:45 PM

(Ticketed Event Open to All Paid Registrants)

☐ Networking Lunch - \$32

## OPTIONAL TOURS AND EVENTS (Pre-Registration Required)

☐ Boston Movie Tour - \$38 ☐ Add'l Tickets: \_\_\_\_\_x(\$38)  
☐ Fenway Park Networking Event - \$79 ☐ Add'l Tickets: \_\_\_\_\_x(\$79)

### Tuesday, August 5, 2014

Tickets for the Tuesday Night Dinner are included in your registration fee. However, please check below to RSVP for your ticket and indicate if you want to purchase additional tickets for your guests. Please note any special dietary requirements on this form.

Tuesday Night Dinner ☐ RSVP Free ☐ Add'l Tickets: \_\_\_\_\_x(\$75)

## WORKSHOPS A - G

**Pre-registration is no longer required.** Attendees may select preferred workshops on-site.

## PAYMENT INFORMATION

Total Payment Enclosed: \_\_\_\_\_

Method of Payment: ☐ Check enclosed, payable to ACLEA  
☐ VISA ☐ MasterCard ☐ American Express

Card Number \_\_\_\_\_

Exp. Date \_\_\_\_\_ 3-digit Security Code (req.): \_\_\_\_\_

Cardholder Name (print) \_\_\_\_\_

Cardholder Phone \_\_\_\_\_

Billing Address \_\_\_\_\_

Cardholder Signature \_\_\_\_\_

(For office use only)

initials	fin.
date	
CK/CC	
amt. paid	
bal. due	comm.

**Mail or Fax form to:**  
**ACLEA**

1000 Westgate Drive  
Suite 252  
St. Paul, MN 55114  
Fax. 651.290.2266

**OR REGISTER ONLINE AT [WWW.ACLEA.ORG](http://WWW.ACLEA.ORG)**

Association for Continuing Legal Education  
1000 Westgate Drive, Suite 252 | St. Paul, MN 55114  
p: 651.366.6082 | f: 651.290.2266  
[aclea@aclea.org](mailto:aclea@aclea.org) | [www.aclea.org](http://www.aclea.org)





Association for Continuing Legal Education  
1000 Westgate Drive, Suite 252  
St. Paul, MN 55114  
[www.aclea.org](http://www.aclea.org)

# ***Save the Date!***

## **ACLEA 51st Mid-Year Meeting**

### **January 31 - February 3, 2015**



Hyatt Mission Bay Hotel  
San Diego, CA