



The Network for CLE Professionals...Worldwide



*43rd Annual  
Meeting*

July 28 - 31, 2007  
Loews Philadelphia Hotel  
Philadelphia, Pennsylvania

## SATURDAY, JULY 28, 2007

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- 7:45 a.m. – 7:30 p.m.  
Registration Desk Open
- 8:15 a.m. – 3:45 p.m.  
New Member Orientation and CLE Boot Camp
- 8:30 a.m. – 12:30 p.m.  
Independence National Historical Park Tour (ticketed event)
- 2:00 p.m. – 4:00 p.m.  
SIG and Committee Chair Leadership Workshop
- 4:00 p.m. – 6:00 p.m.  
SIG Meeting (*In-House*)
- 6:00 p.m. – 7:30 p.m.  
Welcome Reception Honoring New Members and Faculty
- 7:30 p.m.  
First Time Attendees Dinner (ticketed event by invitation only)

## SUNDAY, JULY 29, 2007

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- 7:30 a.m. – 5:00 p.m.  
Registration and Exhibits
- 8:00 a.m. – 9:45 a.m.  
SIG Meetings (*Executive Leadership, Marketing, Publications*)
- 8:45 a.m. – 9:45 a.m.  
Las Vegas Planning Committee Meeting
- 9:45 a.m. – 10:00 a.m.  
Networking Break and Exhibits
- 10:00 a.m. – 10:30 a.m.  
Announcements and President's Welcome
- 10:30 a.m. – 12:00 Noon  
Plenary Session: Questions to Ask When You Develop or Present a Program
- 12:00 Noon – 1:45 p.m.  
SIG Lunches (ticketed event - open to all registrants)  
(*Executive Leadership, Marketing, Publications, Technology*)
- 1:45 p.m. – 3:00 p.m.  
**WORKSHOPS A**
- ◆ Win the War of the Worlds: Preventing, Managing & Resolving Intergenerational Conflict in the Workplace
  - ◆ One With Whiz With ... The Greatest Cheesesteak Ever ... Oops, I Mean Book
  - ◆ Attorney Orientation and Integration: Creating an Experience to Retain Lawyers from Day One
  - ◆ Models for Webcasting - More than One Way to Skin the Cat
- 3:00 p.m. – 3:45 p.m.  
Exhibit Hall Showcase
- 3:45 p.m. – 5:00 p.m.  
**WORKSHOPS B**
- ◆ Recurring Themes of Adulthood: Major Motivators for Learning
  - ◆ Getting a New Outlook: Managing Your Email Instead of It Managing You!
  - ◆ The Ins and Outs of MCLE
  - ◆ Marketing Lessons from "The Music Man"
  - ◆ Collaborative Publishing Relationships and Business Opportunities
- 5:00 p.m. – 7:00 p.m.  
ACLEA Reception, sponsored in part by Practising Law Institute

### SPECIAL THANKS TO THE PHILADELPHIA PLANNING COMMITTEE

*Dana Berman — New York City Bar*  
*Donita Bourns Douglas — Oklahoma Bar Association*  
*Tawnya R. Louder-Reynolds — North Carolina Bar Foundation*  
*Anamaria Melhado — Crowell & Moring, LLP*  
*Vince O'Brien — Minnesota CLE*  
*Carole A. Wagan — Advanced Legal Studies, Suffolk University Law School*  
*Amy Danziger Shapiro (Planning Committee Co-Chair) — ALI-ABA*  
*Donna J. Passons (Planning Committee Co-Chair) — ACLEA Executive Director*

# MONDAY, JULY 30, 2007

7:30 a.m. – 3:00 p.m.

Registration and Exhibits

8:00 a.m. – 8:45 a.m.

Committee Meetings

(*Exhibitors/Sponsors, International, Public Interest*)

8:00 a.m. – 8:45 a.m.

ACLEA/ORACLE Joint Session

9:00 a.m. – 10:00 a.m.

Plenary Session: Project Management for CLE Products

10:00 a.m. – 10:30 a.m.

Networking Break and Exhibits

10:30 a.m. – 12:00 Noon

Plenary Session (*Continued*):

Project Management for CLE Products

12:00 Noon – 1:45 p.m.

SIG Lunches (ticketed event - open to SIG members only)

(*Entrepreneurs, In-House, Law Schools, Local & Specialty Bars, Nationals, State & Provincial Bars*)

1:45 p.m. – 3:00 p.m.

## WORKSHOPS C

- ◆ Practical Exercises in Project Management
- ◆ Ten Steps for Building a Successful Publications Shop
- ◆ Filling the Hall by Developing Dynamic Titles & Exciting Benefit Copy - An Interactive, Hands-On Session
- ◆ Creative Program Evaluation Strategies: Securing the Feedback You Need to Achieve Learning Objectives
- ◆ Interactive CLE: Energize Your Programs with Audience Responders, Videos and Live Theater

3:30 p.m. – 9:00 p.m.

King Tut vs. Rocky!

Networking Excursion (ticketed event)

(Franklin Science Institute Museum & Philadelphia Museum of Art)



## Welcome to Philadelphia

### OPTIONAL EVENTS

#### SATURDAY, JULY 28, 2007

8:30 a.m. - 12:30 p.m.

Independence National Historical Park Tour

#### MONDAY, JULY 30, 2007

3:30 p.m. - 9:00 p.m.

Networking Excursion: King Tut vs. Rocky!

**Don't  
Forget!**

ACLEA offers your choice of printed materials or materials on CD for use on-site during the conference *and* as a great addition to your office library! Be sure to make your selection by checking the appropriate box on the registration form. You cannot change your selection on-site; however you can purchase *both* the CD and printed versions for an additional \$50. Your shoulders will *love* you for it!

*Note: The CD materials do not include the CLE Boot Camp. If you have registered for the Boot Camp you will receive a printed version of the Camp materials.*

# TUESDAY, JULY 31, 2007

7:00 a.m. – 5:00 p.m.

Registration and Exhibits

7:30 a.m. – 8:15 a.m.

Committee Meeting (*MCLE*)

8:30 a.m. – 10:00 a.m.

ACLEA Business Meeting, Breakfast & "ACLEA's Best" Awards (open to all ACLEA members)

10:00 a.m. – 10:30 a.m.

Networking Break and Exhibits

10:30 a.m. – 11:45 a.m.

Plenary Session: A Path for Success: Your One-Year Market Plan

11:45 a.m. – 1:15 p.m.

ACLEA Luncheon for Various Sized CLE Departments

1:15 p.m. – 2:15 p.m.

## WORKSHOPS D

- ◆ Search Engine Ranking Demystified
- ◆ Knowledge Sharing - Up, Down and Across Your Organization!
- ◆ Building Customer Loyalty & Increasing Your Retention Rate
- ◆ In-House Learning at Law Firms: More Than Just CLE- How Law Firms Decide What Training Their Attorneys Need
- ◆ I Should Have Gone to Juggling School – The Art of Publications Work Flow Management

2:15 p.m. – 2:45 p.m.

Networking Break and Exhibits

2:45 p.m. – 3:45 pm

## WORKSHOPS E

- ◆ Promoting a Learning Culture in a Law Firm
- ◆ Extreme Makeovers – New Looks – How Will Your Market Respond?
- ◆ CLE Project Management for the Rest of Us: A Practical Primer on Becoming Ultra-Organized
- ◆ Website Linking - Copyright And Other Selected Issues
- ◆ Making Survey Research Work for You: Getting What You Need and Avoiding the Pitfalls

4:00 p.m. – 5:00 p.m.

Plenary Session: Beyond Reason: Using Emotions as You Negotiate

6:00 p.m. – 9:30 p.m.

ACLEA Closing Event with Ventriloquist Taylor Mason

# SPECIAL EVENTS SCHEDULE

## SATURDAY, JULY 28, 2007

8:30 a.m. – 12:30 p.m.

### Independence National Historical Park Tour (ticketed event)



Ring in the ACLEA Philadelphia meeting with a trip back in time to the beginning of the U.S.A. Independence National Historical Park holds the National Constitution Center, the Liberty Bell Center, and Independence Hall and is surrounded by sites of major importance to the creation of the country as we know it.

The National Constitution Center dramatically tells the story of the Constitution from revolutionary times to the present through more than 100 interactive, multimedia exhibits, film, photographs and artifacts. It is from here that you can gain entry to the Liberty Bell Center to view the Liberty Bell and browse the exhibits showing the history of this American icon.



The birthplace of our nation, Independence Hall, lies right across the street. This historic site was originally built as the Pennsylvania State House, and is where: the Declaration of Independence was first adopted, the U.S. Constitution was written, the design for the American flag was chosen, and it served as the meeting place for the Second Constitutional Congress.

Also nearby are Congress Hall, Franklin Court, Washington Square (with a memorial to Washington and the Tomb of the Unknown Soldiers), historic City Tavern, Carpenter's Hall, Museum of American Philosophical Society, the National Liberty Museum, the Betsy Ross House and Ben Franklin's grave.

Advance tickets may be necessary for some attractions. For more information about Independence National Historical Park visit [www.nps.gov/inde](http://www.nps.gov/inde) or the visitor's center at [www.independencevisitorscenter.com](http://www.independencevisitorscenter.com). For information about the National Constitution Center and its exhibits and tour offerings visit [www.constitutioncenter.org](http://www.constitutioncenter.org).



Meet in the Loews hotel lobby prior to 8:30am. The bus will depart promptly at 8:30am and return to the Loews Hotel by 12:30pm. Cost is \$15 per person (does not include lunch or any individual tour fees) with a minimum of 25 people required, Please make your required reservations on the registration form.

6:00 p.m. – 7:30 p.m.

### Welcome Reception Honoring New Members and Faculty

ACLEA members and their registered guests join together to welcome new members to the organization and to show support for the Philadelphia faculty.

7:30 p.m.

### First Time Attendees Dinner (Ticketed event by invitation only)

A special networking opportunity for First Time Attendees to meet and greet their colleagues over a hearty meal.

## MONDAY, JULY 30, 2007

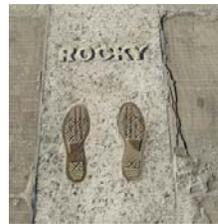
3:30 p.m. – 9:00 p.m.

### King Tut vs. Rocky! Networking Excursion

(The Franklin Institute Science Museum and Philadelphia Museum of Art)

It's the "Italian Stallion" meets the "Boy King", and once you've punched your ticket you're in for an amazing round of Philadelphia sites and sounds.

Thirty years after Tutankhamun's treasures last visited the United States and more than 3,000 years after his death, the treasures of the boy king will be in Philadelphia during the ACLEA conference on their final stop of the current U.S. tour. See the famous King Tut exhibit within the walls of The Franklin Institute Science Museum, home to world-class exhibits on astronomy, sports, weather, transportation, health and wellness. Learn more about your world with interactive hands-on exhibits designed to stimulate your inner-Ben Franklin.



Also in store for this excursion is a visit to the "Rocky Steps" at the Philadelphia Museum of Art. Getting strong now? I hope so, because now is your chance to run up the steps and throw your arms in the air in tribute to one of Philadelphia's defining moments on film. Trust us, you won't be the only one doing it and even Rocky can't beat the spectacular view of the city as seen from this spot.

Please gather in the hotel lobby a few minutes prior to 3:30pm. Buses will depart from the Loews Philadelphia Hotel at 3:30pm sharp and will drop off at either the Franklin Institute Science Museum or the Philadelphia Museum of Art steps before switching locations. Afterward you will be able to eat or shop on your own on South Street or head back to the hotel as the bus will begin looping between the hotel and South Street beginning at 6:45pm until the final drop off at 9:00 pm. Cost per person is \$39 (includes admission to the King Tut Exhibit). Space will fill fast so please make your required reservations on your registration form.

## TUESDAY, JULY 31, 2007

6:00 p.m. – 9:30 p.m.

### ACLEA's Closing Event with Ventriloquist Taylor Mason



Four years ago at the ACLEA meeting in San Francisco, Taylor Mason walked on stage with a puppet and blew the audience away without even moving his lips. Now he's back in his hometown performing for ACLEA, but with an Emmy Award winning children's show called *Taylor's Attic* under his belt.

Trained as an improvisation actor at the Second City Theater in Chicago, he is a man of many trades (comedian, ventriloquist, entertainer, musician, actor) but he has one simple goal: to leave his audience just like his puppets... in stitches.

ACLEA veterans have certainly been moving their lips reminiscing about his San Francisco performance, so don't be left speechless by missing this one! Tickets for registrants are included in the registration fee. Guest tickets are available for \$75 (tickets include dinner). Make your required reservations on the registration form.

# SATURDAY, JULY 28, 2007

7:45 a.m. – 7:30 p.m.

## Registration Desk Open

8:15 a.m. – 3:45 p.m.

## New Member Orientation and CLE Boot Camp

The **CLE Boot Camp** was created to assist our colleagues who are new to the profession and those who just need a refresher. The Camp has met with rave reviews, and ACLEA is committed to continuing this service to its members. The sessions within the Camp are basic level, and the overall curriculum is designed to help you in all areas of CLE programming and publications. We are delighted and thankful to have so many volunteers and “old-timers” help with these sessions. We know you will walk away with lots of information to help you in your own organization.

*Separate Registration Fee Required – Fee includes a continental breakfast, networking luncheon, materials, and a “certificate of attendance.”*

**Presented by:** **John Ceci** - ALI-ABA; **Amy Danziger Shapiro** - ALI-ABA; **Lisa Deane** - State Bar of Arizona; **Anita K. Hamlett** - Alabama State Bar; **Dawn M. McKnight** - Colorado Bar Association CLE; **Donna J. Passons**, Texas Institute of CLE; **Jane S. Rhee** - Shearman & Sterling LLP

### Topics Include:

- ◆ **Program Planning from A to Z** - Discover how to make contacts, decide on subjects, content, faculty and formats, understand budgeting and pricing, develop timelines and deadlines, and how to analyze your results.
- ◆ **The Basics of Marketing CLE Products: From Ideas to Follow-up** - An overview of a professional marketing approach for courses and books utilizing your entire organization, while understanding and adapting to the unique qualities and evolving world of our CLE customers.
- ◆ **Technology and CLE** - Learn how to maximize technology in your daily operations, programming, marketing, publications, and website presence. Make the most of what you already have while looking toward the future of CLE and technology.
- ◆ **Finance and Negotiation Techniques** - Gain insight on how to save money at your seminars and conferences with budgeting, expense monitoring and financial ratios, while learning proven hotel negotiation strategies.
- ◆ **Publications and the MCLE Reporting Process** - Curious about publishing CLE books, working with authors or writing a manuscript? Are you looking for ways to simplify the MCLE application and recording process? Discuss this and other topics you would like the panel to focus on.

### BOOT CAMP AGENDA

- 8:15 Continental Breakfast**
- 8:30 Introduction & What You Hope to Gain as an ACLEA Member**
- 8:45 Program Planning from A-Z**
- 9:30 Speakers and Authors**
- 10:00 Break**
- 10:15 The Basics of Marketing CLE Programs & Products: From Ideas to Follow-Up**
- 11:00 Technology & CLE - Part I: Working with Technology on a Day-to-Day Basis**
- 11:30 Networking Lunch**
- 12:45 Workshops A (Finances, In-House, Publications)**
- 1:45 Break**
- 2:00 Technology & CLE - Part II: Derivative Products**
- 2:30 Live Programs & Evaluations**
- 3:15 The MCLE Application and Reporting Process**
- 3:45 Adjourn**

8:30 a.m. – 12:30 p.m.

## Independence National Historical Park Tour (ticketed event)

See Special Events Schedule for details. Meet in the hotel lobby prior to 8:30am for the trip. Bus departs promptly at 8:30am. Cost per person is \$15 (does not include lunch or any individual tour fees) with a minimum of 25 registrants required. Please make your required reservations on the registration form.

2:00 p.m. – 4:00 p.m.

## SIG and Committee Chair Leadership Workshop

4:00 p.m. – 6:00 p.m.

## SIG Meeting (In-House)

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## Las Vegas Planning Committee Meeting

9:45 a.m. – 10:00 a.m.

## Networking Break and Exhibits

10:00 a.m. – 10:30 a.m.

## Announcements and President's Welcome

10:30 a.m. – 12:00 Noon

## Plenary Session

### Questions to Ask When You Develop or Present a Program

When most of us are asked to teach or present a program, we immediately move to thoughts of our activities – will we lecture, will we form a panel, will we show a movie? Research on teaching and learning indicate that there are prior questions that we should address. Issues of who the learners are and what our content is feed into the question of how we teach through lectures and publications. How we assess our session rarely addresses the issue of whether learning has taken place, but instead most often deals with learner satisfaction. Finally, how we are organized can either enhance or detract from our delivery. This session will present the questions to ask and the theoretical material to provide answers for potential presenters in an effort to ensure the best possible learning outcomes and learner satisfaction.

Patricia Murrell - University of Memphis: Center for the Study of Higher Education

12:00 Noon – 1:45 p.m.

## SIG Luncheons (ticketed event - open to all registrants)

**Executive Leadership**— Join us as we re-energize with one of the greatest tools available - listening and sharing with others. Attendees are asked to consider and be prepared to discuss their answers and opinions to the following questions: 1) What has inspired you in your career thus far? and 2) What goals do you have for your programs and organizations in the immediate future and long term? Moderated by Kathryn Bellman — Nebraska State Bar Association and Mark Sideman — Washington State Bar Association

**Marketing**— “Remember Me?” — How important are first impressions? Very. The way you introduce yourself and describe what you do to someone new is key to how that person will remember you and your organization. Learn the basics of the “30 second elevator speech.” Moderated by Roy S. Ginsburg — Roy S. Ginsburg, J.D.

**Publications**— “Demo of ACLEA Forms Bank & Organizational Resources for Publications” — In a roundtable discussion, the moderators will present information available on the ACLEA website that is useful to publications staff, directors, and related personnel. The discussion will follow-up with how the Publications SIG can further contribute to the exchange of information on the website. Moderated by Dawn M. McKnight — Colorado Bar Association CLE, and Sharon Sandle — State Bar of Texas

**Technology**— Join us at the ACLEA Tech SIG lunch to discuss how to keep your organization up to date with the latest advances in technology. Talk with other Tech SIG members to learn tips and tools for adopting new technologies, introducing them to customers, and deploying them to staff. The meeting is a great opportunity to meet new people, gather new ideas and share your own experiences with technology in the CLE world. Moderated by John Ceci - ALI-ABA

1:45 p.m. – 3:00 p.m.  
**WORKSHOPS A**

**Win the War of the Worlds: Preventing, Managing & Resolving Intergenerational Conflict in the Workplace**

No matter how knowledgeable, skilled or experienced you are - sooner or later - you will be faced with conflict in the workplace. It is inevitable! Friction can easily become further exacerbated, by clashes between members of the different generations, represented in the workplace - the Traditionalists; the Baby Boomers; the Generation X; and the Millennials. Each generation has its own distinct set of values, priorities, expectations and modes of communication. Additionally, workplace “generations” can also refer to “veteran” staff and the “newcomers.” Unresolved, intergenerational conflict in the workplace can adversely affect productivity, teamwork, staff retention and workplace morale. This interactive workshop will provide practical skills, strategies and materials, for successfully preventing, managing and resolving intergenerational conflict, in the workplace.

- Learn how to identify and deconstruct these situations before they become a major problem;
- Develop practical skills and knowledge that will enable you to successfully handle these difficult situations;
- Learn how to maximize the benefits of intergenerational differences; strengthen team effectiveness; and enhance staff morale.

Janice Tudy-Jackson - Columbia Law School

**One With Whiz With... The Greatest Cheesesteak Ever... Oops, I Mean Book**

You’ve got the greatest book ever, wonderful author, awesome content, the editors loved working it - but no one is buying it. You’ll hear about the failures and triumphs of marketing strategies, that apply no matter the size of your shop. We’ll also give you tips on developing a marketing plan, effective use of publications and customer service staff in marketing, writing content, displays, and selling that oh-so awesome book no one knows they should buy!

Pamela J. Jester - Continuing Education of the Bar – California  
Dawn M. McKnight - Colorado Bar Association CLE

**Attorney Orientation and Integration: Creating an Experience to Retain Lawyers from Day One**

Studies show that “employees” who experience a positive orientation are 69% more likely to be with the employer three years later than those who do not. With replacement costs of lawyers ranging between \$250,000 and \$500,000, it is almost fiscally irresponsible not to invest in an effective and efficient orientation and integration program. This program will:

- Discuss the expectations of and reasons for an orientation program
- Provide a framework for structuring an orientation program
- Review pitfalls to avoid in orienting new lawyers
- Share best practices for integrating lawyers into the firm

Tracy L. LaLonde - Akina

**Models for Webcasting - More than One Way to Skin the Cat**

This session will explore strategies for developing Webcasts – the process of building and equipping a studio, how to formulate a plan for your organization, and the challenges in using technology to enhance the learning process. Participants will examine the benefits of presenting short (1-2 hour) studio-based programming vs. longer programs derived from traditional seminars, as well as compare and contrast live programming vs. derivative broadcast media. The presenters will also discuss common-sense approaches to providing a satisfactory user experience for Webcast participants.

Peter H. Berge - Minnesota CLE  
Kel Smith - ALI-ABA

3:00 p.m. – 3:45 p.m.

**Exhibit Hall Showcase**

Don’t miss this opportunity to learn about the products and services offered by the exhibitors and sponsors who help support our ACLEA meetings. Get your Bingo card stamped and enter to win a free registration to ACLEA’s next meeting!

3:45 p.m. – 5:00 p.m.

**WORKSHOPS B**

**Recurring Themes of Adulthood: Major Motivators for Learning**

Participants will have the opportunity to review their adult lives and identify significant markers and milestones. We will then look at the research on the life cycle to identify recurring themes or imperatives: identity, relationships, and generativity. Finally, we will explore the application of these findings to continuing legal education.

Patricia Murrell - University of Memphis: Center for the Study of Higher Education

**Getting a New Outlook: Managing Your Email Instead of It Managing You!**

Is there anyone here who isn’t drowning in an unending sea of email? Is your Inbox indistinguishable from a black hole? This session brings the answers you need for getting a new outlook on your mass of email. We’ll explore how to better use email software to be more organized with the least amount of effort. We’ll also show the most useful email add-on tools, tips and techniques to bring painless organization out of otherwise sheer digital chaos. Information you can put to use in your CLE organization the very next day!

Ross L. Kodner - Factum Inc.



## The Ins and Outs of MCLE

Confused by the CLE application process? Frustrated by various rules and regulations of the different states? Let us help you! Teamed together are Leslie Belasco of ALI-ABA and Dawn Chellel of The National Constitution Center Conferences, who will guide you through the basics (and not-so basics) of the MCLE process. During this session they will give you strategies for applying for credit, reporting credit, and maintaining your relationships with the various MCLE jurisdictions. In addition, they will educate you on such options as reciprocity and comity, accredited provider status, retroactive credit, and Form1.org, and how these can benefit you as a provider.

Leslie A. Belasco - ALI-ABA

Dawn Chellel - National Constitution Center Conferences

## Marketing Lessons from "The Music Man"

Professor Harold Hill, the fictional character made famous in *The Music Man*, was a master marketeer. "The fella sells bands, BOYS' BANDS! I don't know how he does it..." Well, we know, and we'll give you tips on finding ideas, turning those ideas into a vision and selling them. Can you "sell" within the context of the law and legal education without resorting to flim-flam? Yes... if you know how persuasion works, how to persuade and how to create "buzz" without getting stung. We'll provide some entertainment surprises to help you cut through mounds of guru-generated verbiage and get to the essence of marketing.

Roger B. Curlin III - Holland & Knight LLP

Anna Marie Thatcher - Periaktos Productions, L.L.C.

Graham Thatcher - Periaktos Productions, L.L.C.

## Collaborative Publishing Relationships and Business Opportunities

How can CLE providers and In-House CLE professionals work with legal publishers to create new or enhanced legal information products and services for their members? Join us for a discussion of collaborative ideas in the areas of content, manufacturing, technology, marketing, and sales channels.

Robert Anderson - LexisNexis

Gregory J. Smith - National Institute for Trial Advocacy

5:00 p.m. – 7:00 p.m.

## ACLEA Reception

Join your ACLEA colleagues at the annual reception sponsored, in part, by our Platinum Sponsor - Practising Law Institute. Tickets for registrants are included in your registration fee. Tickets for guests are \$30 per person. Please make your required reservations on your registration form.

# MONDAY, JULY 30, 2007

7:30 a.m. – 3:00 p.m.

## Registration and Exhibits

8:00 a.m. – 8:45 a.m.

## Committee Meetings

(Exhibitors/Sponsors, International, Public Interest)

8:00 a.m. – 8:45 a.m.

## ACLEA/ORACLE Joint Session

This session will be comprised of a moderated discussion among ORACLE and ACLEA members about issues significant to them as determined by a survey sent to members of both organizations.

9:00 a.m. – 10:00 a.m.

## Plenary Session

### Project Management for CLE Products

Can project management principles really be applied to planning a program or publication? As you may already realize, CLE product planning easily fits the criteria of a project; it has a deadline, a defined scope and limited available resources and funding. In this session you will learn a simple process model, basic guidelines, practical tools and techniques to set up and run your workshop quickly and effectively. Topics will include initiating and defining the project, as well as planning using a work breakdown structure, network diagram, critical path analysis, risk management and cost estimating. Using illustrations from Microsoft Project 2003 we will look at tracking and controlling the project. In a follow-on session we will get to the very practical activity of creating reusable templates. Working in teams, you will create a work breakdown structure that can be generalized for use in planning CLE projects.

Joe Turner - Turner Consulting

10:00 a.m. – 10:30 a.m.

## Networking Break and Exhibits

10:30 a.m. – 12:00 Noon

## Plenary Session (Continued...)

### Project Management for CLE Products

Joe Turner - Turner Consulting

12:00 Noon – 1:45 p.m.

## SIG Lunches (ticketed event - Closed Luncheons - you must be a member of the SIG to attend)

**Entrepreneurs**— What are the critical business issues facing your organization today? Sales and marketing? Finance? Human Resources? Whatever the

problem, someone in the SIG may have faced a similar issue and has a solution for you. Join us for a roundtable discussion and pick the entrepreneurial brains of your fellow SIG members. Moderated by Roy S. Ginsburg — Roy S. Ginsburg, J.D., and Mark Rosch — Internet for Lawyers

**In-House**— *"The Good, The Bad, and The Ugly"* - A road map to various state accrediting entities. An insightful discussion regarding the myriad of regulations, procedures and "unspoken" rules to the CLE process. Everyone is asked and invited to offer up suggestions, contacts and war stories to working with the various state CLE authorities. This lunch will shed some light (as well as humor) to our posts as preferred providers and/or CLE applicants! Moderated by Tracey Boylston — Greenberg & Traurig, and Anamaria Melhado — Crowell and Moring, LLP

**Law Schools**— *"Globalizing your CLE Shop"* - Become international. Develop a CLE program in coordination with your university's study abroad program. Cosponsor with another law school's CLE international program. Bring international lawyers to your local programs. It's a very rewarding challenge. Come to the law school SIG luncheon and learn about different opportunities to internationalize your programs, meet people from other cultures and travel to interesting countries. Moderated by Carmen P. Lopez — Inter American University of Puerto Rico School of Law, and Darin L. Neely — Fordham University School of Law

*"A fantastic learning experience!  
Everyone was so nice and really  
welcomed new members."*

-FIRST-TIME ATTENDEE IN NASHVILLE

**Local & Specialty Bars**— *“Pimp My CLE”* – Are your programs, marketing, Board/Committee work and volunteer outreach “weak and wimpy, or truly pimped?” Find out what your local and specialty bar colleagues have done recently to add snazz and pizzazz to their CLE lives. Bring samples for others to peep. Crew Chiefs Susan Blair – Nashville Bar Association and Mary Lynne Johnson – Atlanta Bar Association will lead the rap.

**Nationals**— Hey, let’s stop focusing on all of the difficulties associated with being a national provider and let’s start talking about some of the competitive advantages we have! In this luncheon, we will not only talk about the difficulties of being a national provider, but all of the competitive advantages we hold. Luncheon attendees should be ready to share ways we can maximize these competitive advantages in the marketplace, while still bringing high quality education to the legal profession. Moderated by Tia Embke — National Business Institute, and Matt Mickelson — National Business Institute

**State & Provincial Bars**— What is great customer service? Is the customer always right? Who are our CLE customers? These questions and others will be discussed as we explore how to maintain a balance between customer demands and customer satisfaction. Moderated by Karen D. Lee — Oregon State Bar

*“I don’t think people realize the value of this conference... there is a huge return on investment!”*

- ACLEA NASHVILLE ATTENDEE

1:45 p.m. – 3:00 p.m.  
**WORKSHOPS C**

#### **Practical Exercises in Project Management**

Having attended the project management for conference planning session as a prerequisite, we will get to the very practical work of creating reusable templates. Using a simple case study, and working in small teams, you will build a work breakdown structure and rudimentary network diagram. We will work together to mold them into templates. The very latest in project technology will be employed: sticky notes, markers and flipchart paper.

Joe Turner - Turner Consulting

#### **Ten Steps for Building a Successful Publications Shop**

Take your publishing knowledge to the next step with best practices from your ACLEA publishing colleagues. Learn how to ensure the quality of your content, how to effectively market - even on a shoestring budget, how to answer the distribution question auto ship vs. non-auto ship, and how to calculate financial viability. Gain the answers to these burning questions, as well as other valuable publishing tips from small and large shops, and climb the steps to being a CLE publishing champion!

Kent R. Hopper - The Missouri Bar (Moderator)  
Pamela Davies Smith - Pennsylvania Bar Institute

#### **Filling the Hall by Developing Dynamic Titles & Exciting Benefit Copy - An Interactive, Hands-On Session**

Do you ever get tired of trying to come up with new program titles? Do you ever strain to develop excellent benefits copy? If not, you can attend a different break-out session. However, if you, like most of us, find yourselves straining from time to time to develop enticing titles and attractive benefits copy, then this session is for you. Two veterans of the drafting wars will share secrets of crafting winning titles that encourage prospective attendees to keep reading and powerful benefits copy that propels positive attendance decisions. You will draft your own titles and copy, share lessons with your colleagues and leave with takeaways that you can use for your own CLE programs as soon as you get home. Unless, of course, you live in Philadelphia, in which case you can use them immediately!

Lawrence J. Center - Georgetown University Law Center  
Sheldon J. Stark - Institute of Continuing Legal Education

#### **Creative Program Evaluation Strategies: Securing the Feedback you Need to Achieve Learning Objectives**

You know how important it is to measure the effectiveness of your programs in advancing participant learning. You know the value of gathering participant feedback to inform program improvement and new program development. Yet, you also know how challenging it is to motivate busy participants to complete even the most streamlined evaluation forms or surveys—or elaborate with meaningful comments. Join this session to explore some realistic strategies for engaging learners in letting you know how well a program met their needs and what else you might do to support their professional development.

Elaine M. Ohlson - Elaine Ohlson Consulting

#### **Interactive CLE: Energize Your Programs with Audience Responders, Videos and Live Theater**

All three can be terrific ways to engage your audiences, but if they’re not done well, they can be an expensive waste of time. Through demonstrations and discussions, learn what Minnesota and Texas have done, and discover how you can do these things yourself, even on a budget. The presenters will discuss a range of Audience Response System options, and share dos and don’ts for video vignettes and live skits.

David Kroll - State Bar of Texas

Timothy M. Morrow - Minnesota CLE

3:30 p.m. – 9:00 p.m.

#### **King Tut vs. Rocky! Networking Excursion (ticketed event)**

See Special Events Schedule for details. Depart from the Loews Philadelphia Hotel’s foyer at 3:30 p.m. sharp. **Cost per person is \$39** (includes admission to the King Tut Exhibit). Please make your required reservations on your registration form.

**TUESDAY, JULY 31, 2007**

7:00 a.m. – 5:00 p.m.

#### **Registration and Exhibits**

7:30 a.m. – 8:15 a.m.

#### **Committee Meeting (MCLE)**

8:30 a.m. – 10:00 a.m.

#### **ACLEA Business Meeting, Breakfast and “ACLEA’s Best” Awards (open to all ACLEA members)**

Some people think the ACLEA Business Meeting is a great time to sleep in. Wrong!!! This is the time to eat the best breakfast of the meeting (and, after all, it’s included in your tuition!). Not only can you eat to your heart’s content from an expansive buffet, but you can learn what is going on in YOUR association as your officers, Executive Director and committee chairs make reports. This meeting is NOT just for the heads of your shops, but for all ACLEA members. Don’t forget: more learning and information sharing gets done over meals than anywhere else, so this is a great opportunity to get your most important questions answered while you are enjoying a great meal. Just sit down next to the person whose brain you want to pick!

The “ACLEA’s Best” Awards for each of the 5 categories (Marketing, Programming, Publications, Public Interest, and Technology) will also be awarded during this meeting. We know you will want to show your support for the ideas and submissions of your fellow colleagues. Their submission may just be the inspiration you’ve been waiting for!

10:00 a.m. – 10:30 a.m.

### Networking Break and Exhibits

10:30 a.m. – 11:45 a.m.

### Plenary Session

#### **A Path for Success: Your One-Year Market Plan**

More critical now than ever is the development of a one-year marketing plan all members of your organization can follow. Taking time to develop this plan is a must. The plan must be specific and measurable. Learn about market segmentation, financial analysis, branding, winning promotion timelines, plus much more. Everything you learn will be practical. After this session, you will be able to take immediate actions towards developing a one-year market plan for your CLE product. You'll have the tools to compete, and win, in the tough new environment.

Greg Marsello - LERN

11:45 a.m. – 1:15 p.m.

### ACLEA Luncheon for Various Sized CLE Departments (ticketed event)

Do you have marketing, publications and IT departments or individuals? Do you do all three by yourself? Are you in the ring by yourself, on a tag team or in a gang? Join your fellow CLE "fighters" for a lunch with colleagues in similar "training programs" as they punch and kick their way to new ideas. Cost per person is \$26. Please make the required reservations on your registration form according to your department's size.

1:15 p.m. – 2:15 p.m.

### WORKSHOPS D

#### **Search Engine Ranking Demystified**

The goal of this session will be to explain how the popular search engines rank your pages in their index and what simple changes you can make to your site to help your rankings. It will also go over a couple of software packages that you can use to track how visitors got to your site.

John Ceci - ALI-ABA

#### **Knowledge Sharing - Up, Down and Across Your Organization!**

Teaching/learning at all levels is the best model for organizational success. Not sure how you can share information from professional meetings, readings, websites, etc.? This fast-paced session highlights techniques to help you share knowledge with your boss, board, peers, and staff. You can use 1-minute stand-up hallway meetings to staff retreats (and more) to become a key information sharer at your workplace!

Barbara Armstrong - Alaska Bar Association

Donita Bourns Douglas - Oklahoma Bar Association

#### **Building Customer Loyalty & Increasing Your Retention Rate**

Getting your current and past participants to come back is the key to growth and profitability. Learn how to determine your repeat rate and the lifetime value of your customers. Find out the most successful customer retention strategies for lifelong learning programs and how to implement them.

Greg Marsello - LERN

#### **In-House Learning at Law Firms: More Than Just CLE - How Law Firms Decide What Training Their Attorneys Need**

This session will explore how law firms go about identifying the critical skills and knowledge their attorneys need and the essential learning activities that will help develop those skills and knowledge. It's not just a search for CLE credits. Leadership, business development, writing, networking, mentoring, internal policies and procedures, legal skills, substantive law, and more all have a place in the contemporary law firm's learning program. Join the discussion and gain insight on what happens behind closed doors when law firms make their learning decisions.

Jan F. Majewski - Holland & Knight LLP

#### **I Should Have Gone To Juggling School – The Art of Publications Work Flow Management**

From getting chapters in the door to sending the final book to the printer, work flow management is key to a successful publications shop. How do you keep your editorial staff busy without creating too great a backlog? How do you impose realistic deadlines on authors who are always late without running out of work for your staff. You can't work on just one book at a time, but how do you and your staff multi-book without getting lost? Hear and share ideas

for successful work flow management with two ACLEA members who have experience in juggling the work flow of multiple publications.

Linda Kruschke - Oregon State Bar

Lisa Travis Fischer - Colorado Bar Association CLE

2:15 p.m. – 2:45 p.m.

### Networking Break and Exhibits

2:45 p.m. – 3:45 p.m.

### WORKSHOPS E

#### **Promoting a Learning Culture in a Law Firm**

Large U.S. law firms have been engaged in offering educational programs to attorneys and business staff for many years. While billable hours and time

constraints have always been a challenge to providing meaningful, time sensitive programs, technological developments and efficiencies have allowed law firms to pursue and provide new time-saving modalities for educational content delivery. E-learning platforms allow for dissemination of firm history, culture, objectives as well as the high value in-house training events. The business objective is to create a learning philosophy to expedite skills development and learning to all employees. Through the use of information and communications technology, the learning audience is expanded, raising the knowledge and expertise base more quickly and controlling costs associated with the loss of billable hours and repetitive training.

Rachel Jones - Greenberg & Traurig

#### **Extreme Makeovers – New Looks – How Will Your Market Respond?**

After spending countless hours and significant resources on redirecting your brand, will your target audience love it or hate it? Will they even notice? We'll be looking at two examples of extreme makeovers, in one case of a product line and then of an entire organization's brand, followed by a discussion of the risks and benefits of experimentation as well as the market's response to these makeovers.

Matthew Born - ALI-ABA

Adele Lemlek - New York City Bar

Sharon Sandle - State Bar of Texas



## CLE Project Management for the Rest of Us: A Practical Primer on Becoming Ultra-Organized

What CLE professional couldn't stand to be better organized when mapping out projects and initiatives? This session covers two classes of project management and timeline tools and techniques available to CLE professionals. We'll compare traditional project management via Microsoft Project and alternate approaches. We'll look at other project management tools that can be MUCH less complex and costly and might actually work better, such as re-purposed legal practice management systems, and the CaseMap/TimeMap combination of tools.

Ross L. Kodner - Factum Inc.

## Website Linking - Copyright And Other Selected Issues

How do the rules against contributory copyright infringement apply to what you do on your website with others' links? Are you aware of the requirements of the Digital Millennium Copyright Act? And don't forget—third-party links raise it's not just copyright, but trademark issues as well. Find out about these and the many other issues before you click that "hyperlink" button to add another link to your website.

Roberta Jacobs-Meadway - Ballard  
Sphar Andrews and Ingersoll, LLP

## Making Survey Research Work for You: Getting What You Need and Avoiding the Pitfalls

This presentation will address the key considerations in designing, implementing, and analyzing survey research. Practical approaches to these key considerations will be detailed and ways to avoid the common mistakes encountered in the process of conducting survey research will be discussed. Attendees will be provided with a systematic framework for developing their own survey research information and for assessing the merits of the survey research information that they encounter.

Gary Stieger, GLS Research

4:00 p.m. – 5:00 p.m.

## Plenary Session

### Beyond Reason: Using Emotions as You Negotiate

Emotions can turn even the simplest negotiation or conflict into a full-blown fiasco. So how should you deal with emotions? In this talk, Dr. Shapiro, one of the world's foremost experts on negotiation, clarifies this complicated, "fuzzy" world of emotions. His breakthrough research highlights five "core concerns" that lie at the heart of any conflict or negotiation. You will learn how to use these core concerns to generate helpful emotions in yourself and in others, transforming any interaction into an opportunity for mutual gain. This talk's framework has been successfully employed by large corporations, consulting firms, small business owners, academics, world leaders, hostage negotiators, couples in dispute, and many, many others.

Daniel L. Shapiro - Harvard Law School

6:00 p.m. – 9:30 p.m.

## ACLEA Closing Event with Ventriloquist Taylor Mason

See Special Events Schedule for details. Tickets for registrants are included in the registration fee. Cost per guest is \$75. Please make your reservation in advance on your registration form and be sure to include the number of guests attending.

## Interested in being an ACLEA Exhibitor or Sponsor in Philadelphia?

ACLEA meetings are a terrific opportunity to promote your products and services to the decision makers who will use them!

As an ACLEA exhibitor or sponsor you have:

- The opportunity to promote your presence in advance of the meeting to generate leads and interest in your services.

- Maximum visibility with attendees! The Exhibit Area is in the same area as the refreshments, and it is in close proximity to the meeting rooms, so the attendee traffic is great!

- Time to visit with potential new clients about your product or service!

The meeting schedule provides for networking breaks between conference sessions - enough time to really talk to potential clients.

- Special attention and extra contact time during our "Exhibitor Showcase" afternoon break on Sunday, July 29, 2007. Attendees are provided with an opportunity to visit each Exhibitor booth and become eligible for a grand prize drawing for a free registration to ACLEA's next meeting. ACLEA provides the refreshments, so this special event is always a favorite of attendees!

***Exhibit space is limited and priority on booth selection is based on the order in which Exhibitor/Sponsor registrations are received, so reserve your space today!***

For the sponsor/exhibitor registration form, and the full listing of opportunities and benefits available to sponsors and exhibitors, visit [www.aclea.org/exhibitor.html](http://www.aclea.org/exhibitor.html).



*"At our first ACLEA conference, we weren't sure what to expect as exhibitors, but the show ended up being a phenomenal experience for us and the debut of our FastCLE program! It was the most welcome we have ever felt at any show and the leads were the true decision makers we had been looking for!"*

- JOHNSON COOK, PRESIDENT, IMPACT MEDIA SOLUTIONS, INC.

*Photos contained in this brochure are courtesy of the Philadelphia Convention and Visitors Bureau. Photos by Scott Frances, Ltd., Jim McWilliams, Edward Savaria, Jr., and Anthony Sinagoga.*

## What's in store for ACLEA in 2008?

It's never too early to start planning for the future! ACLEA has already begun the planning process for the 44th Mid-Year Meeting and 44th Annual Meeting in 2008. So mark these dates on your calendar now and when you return home from Philadelphia you will already have something to look forward to!

### ACLEA's 44<sup>th</sup> Mid-Year Meeting

January 26 - 30, 2008

Green Valley Ranch Resort  
Las Vegas, Nevada

ACLEA travels to the "City That Never Sleeps" for a meeting that leaves nothing to chance! Set in an amazing resort facility that will leave you feeling lucky you attended, the planning committee for ACLEA Las Vegas is already hard at work to make sure "What Happens in Vegas, *Doesn't* Stay in Vegas!"

### ACLEA's 44<sup>th</sup> Annual Meeting

August 2 - 5, 2008

Hyatt Regency Vancouver  
Vancouver, British Columbia, Canada

ACLEA returns to Canada with a program so powerful we had to cross the border to hold it! Set in a dynamic city voted the "Best City in the Americas" for three straight years by Condé Nast Traveler magazine, Vancouver's ambience, friendliness, culture, restaurants, lodging and shopping will make it a trip for the ages. *Remember, travel into Canada from the U.S. requires an official passport. If you do not have a passport (or need to renew one) you will need to apply well in advance of the meeting. Current passport processing times are up to 10 weeks. Visit the U.S. Department of State at <http://travel.state.gov> for more information on the passport application and renewal process.*

#### Questions?

Call or e-mail ACLEA headquarters at  
(512) 453-4340 or [aclea@aclea.org](mailto:aclea@aclea.org)

#### Register By:



Mail: P.O. Box 4646  
Austin, TX 78765



Fax: (512) 451-2911



Online Registration  
<http://www.aclea.org>

## GENERAL INFORMATION

### Registration

The program registration fee includes conference materials, admission to Sunday, Monday, and Tuesday sessions, the business meeting and breakfast, and the Tuesday night special event. Saturday's CLE Boot Camp sessions, 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. All special event and tour fee payments are nonrefundable after July 13, 2007.

**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 spouse/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 \$95 fee includes the 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. 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 Loews Philadelphia Hotel. ACLEA has secured a special room rate of \$175.00, for double or single until **July 2, 2007**. To make your reservations, call (215) 231-7333 and request the Association for Continuing Legal Education group rate. **Please note: ACLEA has obtained this room rate by contracting a total meeting package at the Loews Philadelphia. 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:**

**The Loews Philadelphia Hotel**  
1200 Market Street  
Philadelphia, Pennsylvania 19107  
Phone (215) 627-1200  
Fax (215) 231-7305

### Special Rebate Policy

Registrants who stay at the Loews Philadelphia Hotel during this meeting will receive a \$50 coupon that may be used toward the registration fee for a future ACLEA meeting held in 2008 or 2009. Only one coupon will be offered per room reservation and cannot be redeemed for cash. Only attendees who pay the meeting registration fee are eligible for this rebate. The meeting fee coupon is nontransferable.

### Transportation

The Loews Philadelphia Hotel is approximately 11 miles (20 minutes) from the Philadelphia International Airport (PHL). Lady Liberty Shuttle service is available for \$10 per person, but you must make reservations in advance by calling (215) 724-8888. Taxi and limousine service can be booked through the hotel guest services at (215) 231-7250. Taxi fares from the Philadelphia airport to the Loews Philadelphia are a flat-rate of \$26.25 one-way. By train, take the R1 train from the airport to the Market East Station directly across the street from the hotel for \$5.50 per person.

### Cancellation Policy

All special event & tour fee payments are nonrefundable after July 13, 2007. Registration refunds, less a \$50 processing fee, will be given to registrants who cancel by 5:00 p.m. Friday, July 13, 2007. If notice is received between July 13 and 20, 2007 at 5:00 p.m., refunds will be given less a \$150 processing fee. No refunds or transfers will be granted thereafter.

# 43rd Annual Meeting

July 28 - July 31, 2007  
Loews Philadelphia Hotel  
Philadelphia, Pennsylvania



## Philadelphia

*Why You Should Attend:*

### A Message From the Planning Committee

Experience the sights, sounds and tastes that are Philadelphia, while you enhance your CLE skills & knowledge. Learn from some of the most accomplished speakers and fellow ACLEA members and “climb the steps” to CLE success.

This meeting promises outstanding plenary sessions and workshops that will provide you with the tools to take your knowledge to the next level. Presenter Patricia Murrell, Director of the Center for the Study of Higher Education at University of Memphis will provide you with the key questions to ask when you develop a CLE program. Greg Marsello of LERN will guide you in developing an effective one-year marketing plan with a bonus session on customer retention. Daniel Shapiro of Harvard Law School and the Harvard International Negotiation Initiative will provide guidance on using your emotions when you negotiate. And finally, Joe Turner of Turner Consulting will present a one day workshop focused on fine-tuning your skills in project management.

Philadelphia is a fantastic city with plenty to do and see. Come early or stay late and spend time in this incredible city. It is a great place to bring your family.



The Network for CLE Professionals...Worldwide

Leadership, Education, Development

