Working with (Program) Planning Committees

By:

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Texas Institute of CLE

Presented at:
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February 2-5, 2013
Clearwater, FL
Donna Passons, President of the Texas Institute of Continuing Legal Education (TICLE) and Specialized Professional Institutes (SPI), received her BA in Government and her Master of Business Administration from the University of Texas at Austin. With more than 30 years of experience in continuing legal education, she expanded her business to include association management and became the Executive Director of the Association for Continuing Legal Education in 1995. Before launching TICLE, Donna spent more than 14 years in the Continuing Legal Education Department at the University of Texas Law School in Austin, Texas. During the last five years of her tenure, she served as the department's Assistant Dean and Executive Director for Continuing Legal Education where she developed and managed over 40 CLE seminars a year and recruited 900 volunteers annually. Donna has been a member of ACLEA since 1981, served on the Executive Committee of ACLEA beginning in 1983, and was President of the organization in 1988-1989. She and her brother, a PGA professional, launched Passons Golf Tournaments in 2001, specializing in corporate and charity golf tournaments. She is a member of the American Society of Association Executives (ASAE), the Texas Society of Association Executives (TSAE), and is listed in Who's Who in American Women.
Overview of the Planning Process

Introduction of the planning process and discussion of who uses planning committees and in what format?

Why form a planning committee?

Forming the Committee

Who should you ask to serve on the Planning Committee?
Create a list of potential planning committee members. Include former planning committee members, speakers, bar committee or section members, law faculty, volunteers, anyone you boss tells you to add 😊, and lawyers you like and want to work with.

Consider the following to get good representation:
Geographic Location of the Lawyer’s Office
Firm Size
Will the Lawyer add diversity?
What is the lawyer’s level of knowledge in the area?
What do you know about the lawyer?

How do you select the members of the committee (for a new conference and for a repeat conference)?

How do you determine who you should ask to return to an annual conference planning committee and who you should not extend the invitation to?

How many do you invite? Do you invite more than one person from the same firm? If you are a law school do you always or never include academics?

Do you allow “substitutions”?
When should the Planning Committee meet?

Standard 1 and 2 day programs – at least 8 months prior to the program

Resort/Cruise/week long programs with activities – at least 14 months prior to the program

How do you deal with a “rush” program?

What time of day should the committee meet?

Do you have more than one meeting?

Where should the Planning Committee meet? At your office, a law firm, or a neutral site?

Consider cost

Consider airline/travel schedules

Consider control

Consider meeting effectiveness

What does a Planning Committee do?

Before you can answer this, you must know the level of authority or power given to the planning committee. This should be established by internal policy and the lines of authority and responsibility should be communicated to the planning committee chair and members.

The planning committee would at minimum, **DO** the following:

1. Determine the level of the conference (what is your intended market)
   Beginner
   Intermediate
   Advanced
2. Determine the topics
3. Discuss length of topics
4. Suggest speakers for discussion and approval by the full group
5. Invite and confirm speakers

While this is what the planning committee will “do”, you as the program planner, should gently nudge them in the right direction by sharing your expertise and knowledge of all you know about what works and doesn’t work, who is and is not a great speaker, what topics were recommended on past evaluations, etc.

The planning committee would **have input** into the following areas:

1. Program length (1/2 day, 1 day, multi-day)
2. Program type (lecture, workshop, interactive, mixed)
3. Date for the program
4. Location
   a. City (taking the program to your market)
   b. Resort (taking the market to your program)
   c. Multiple locations (same speakers or speakers from the location)

The CLE Programmer would be responsible for the following (at minimum):

1. Budget (including projected income, production costs, promotion cost, operating margin, overhead cost, opportunity cost)
2. Marketing
3. Policies around program development and offerings

**Who Controls the Committee Meeting and How**

Do you invite a chair, a co-chair, a vice-chair or no chairs?

Let the Chair control the meeting, but you must be ready to guide the discussion and tactfully assist the chair as needed.

How do you “read” the committee members and their enthusiasm toward a topic or speaker? What do you do when a topic is only of interest to the committee member who suggested it? What do you do when a committee member is pushing their own agenda?

Encourage all committee members to be involved.
Should you allow planning committee members to be speakers? Pros and cons

Members of the planning committee should help market the program. Some ideas include:
   1. Send extra brochures to planning committee members and ask them to distribute them to interested attorneys and professionals
   2. Find out if any of your committee members are members of organizations that may have an interest in either co-sponsoring the program or sending their members at a discounted rate
   3. Send a blast email template and ask them to forward it on to their contacts

Communicating with the Planning Committee

How do you communicate with the committee before, during and after?

What materials do you provide planning committee members?

How do you follow up with the committee?

Managing the Process in Your Office

How do you manage the work flow as speakers confirm?

How do you keep everyone on your staff informed of confirmations?

How do you get from confirmation to print?
THURSDAY, February 21, 2013

PRESIDING OFFICER:

9:00 a.m.  TOPIC I

SUGGESTED SPEAKERS:
1. _____________ Contact:
2. _____________ Contact:
3. _____________ Contact:

9:45 a.m.  TOPIC II

SUGGESTED SPEAKERS:
1. _____________ Contact:
2. _____________ Contact:
3. _____________ Contact:

10:30 a.m.  COFFEE BREAK

10:45 a.m.  TOPIC III

SUGGESTED SPEAKERS:
1. _____________ Contact:
2. _____________ Contact:
3. _____________ Contact:

11:30 a.m.  TOPIC IV

SUGGESTED SPEAKERS:
1. _____________ Contact:
2. _____________ Contact:
3. _____________ Contact:
12:15 p.m. LUNCH - Speaker?

1:30 p.m.  TOPIC V

SUGGESTED SPEAKERS:
1. ________________ Contact:
2. ________________ Contact:
3. ________________ Contact:

2:15 p.m.  TOPIC VI

SUGGESTED SPEAKERS:
1. ________________ Contact:
2. ________________ Contact:
3. ________________ Contact:

3:00 p.m.  COFFEE BREAK

3:15 p.m.  TOPIC VII

SUGGESTED SPEAKERS:
1. ________________ Contact:
2. ________________ Contact:
3. ________________ Contact:

4:00 p.m.  TOPIC VIII

SUGGESTED SPEAKERS:
1. ________________ Contact:
2. ________________ Contact:
3. ________________ Contact:

4:45 p.m.  ADJOURN
FRIDAY, February 22, 2013

PRESIDING OFFICER:

9:00 a.m.  TOPIC I

SUGGESTED SPEAKERS:
1. ____________Contact:
2. ____________Contact:
3. ____________Contact:

9:45 a.m.  TOPIC II

SUGGESTED SPEAKERS:
1. ____________Contact:
2. ____________Contact:
3. ____________Contact:

10:30 a.m.  COFFEE BREAK

10:45 a.m.  TOPIC III

SUGGESTED SPEAKERS:
1. ____________Contact:
2. ____________Contact:
3. ____________Contact:

11:30 a.m.  TOPIC IV

SUGGESTED SPEAKERS:
1. ____________Contact:
2. ____________Contact:
3. ____________Contact:

12:15 p.m.  LUNCH - Speaker?

1:30 p.m.  TOPIC V

SUGGESTED SPEAKERS:
1. ____________Contact:
2. ____________Contact:
3. ____________Contact:
2:15 p.m.  TOPIC VI

SUGGESTED SPEAKERS:
1. _________________ Contact:
2. _________________ Contact:
3. _________________ Contact:

3:00 p.m.  COFFEE BREAK

3:15 p.m.  TOPIC VII

SUGGESTED SPEAKERS:
1. _________________ Contact:
2. _________________ Contact:
3. _________________ Contact:

4:00 p.m.  TOPIC VIII

SUGGESTED SPEAKERS:
1. _________________ Contact:
2. _________________ Contact:
3. _________________ Contact:

4:45 p.m.  ADJOURN
Work Flow Process
For Planning, Inviting and Confirming Speakers

25th ANNUAL CONSTRUCTION LAW CONFERENCE
February 21 & 22, 2013
12720 Merit Drive                      Westin Galleria Hotel                  Dallas, Texas

Thursday, February 17, 2007
PRESIDING OFFICER:   William B. Short, Jr., Dallas (Passons)

Program Draft 1 - Post planning working document

8:00 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW
            Pete Smith, affiliation??, city?? (Johnson)

Program Draft 2 - Identification of speaker acceptances

8:30 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW
            Pete Smith, affiliation??, city?? (accepted)

Program Draft 3 - After research of correct spelling and affiliation

8:30 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW
            Gale R. Smith, Ludwik, Holmes, Greg & Toll, LLP, San Antonio (accepted)

Program Draft 4 - Mailed to speaker with request for topic description

8:30 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW
            Gale R. Smith, Ludwik, Holmes, Greg & Toll, LLP, San Antonio (9/14/06)

Program Draft 5 - Receipt of topic description and confirmation of name and firm

8:30 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW—This presentation provides an update and survey of evolving cases that deal with the protection of confidential information, including the continued development of the concept of inevitable disclosure.
            Gale R. Smith, Ludwik, Holmes, & Toll, LLP, San Antonio (9/14/06)

Program to Printer

8:30 a.m.  RECENT DEVELOPMENTS IN TRADE SECRET LAW—This presentation provides an update and survey of evolving cases that deal with the protection of confidential information, including the continued development of the concept of inevitable disclosure.
            Gale R. Smith, Ludwik, Holmes, & Toll, LLP, San Antonio
September 15, 2012

«First_Name» «Last_Name»
«Company»
«Address_l»
«City», «State» «Zip»

Dear «Salutation»:

We want to thank you, on behalf of The Construction Law Section of the State Bar of Texas, for agreeing to participate in the 25th Annual Construction Law Institute to be held February 21-22, 2013 at the Westin Galleria Hotel in Dallas, Texas.

A draft of the program is attached for your information. Please indicate any changes in the listing of your name, firm, or topic title on the enclosed draft and return it to me as soon as possible.

We need five things from you.

We request that you submit a brief description (25 words or less) of the content of your presentation as soon as possible. We will need this information to print it in the conference announcement. I have attached a copy of the 2012 brochure to assist you in writing your description. If you have already submitted your topic description, please verify the description on the enclosed program draft.

We ask each speaker to submit an expanded outline, which contains citations, textual treatment of each subtopic, and forms or other materials that would be helpful to the registrants. We must have your material by January 21, 2013 so that it can be reproduced. Please mark this date on your calendar. Enclosed is a guideline for submitting your written materials.

In addition to the paper copy, please forward a copy of your materials in word or word perfect format to bills@clesolutions.com. We will be providing the conference materials on our website and ask that you sign the enclosed release and return it with your other forms.

Please send a short biographical sketch (preferably in paragraph form) by January 21, 2013.

Please complete the audio-visual/room set-up form and return it to me by February 3, 2013.

To help you meet these deadlines, I have enclosed a time schedule for your use. Please give this schedule to whoever is assisting you with your preparation and attendance at this conference.
The conference will be recorded and cassette tapes may be made available to the attendees at a later date. If you have any objections to this, please let me know.

If you have any questions or need further information, please do not hesitate to contact me. I look forward to seeing you in February.

Sincerely,

Donna J. Passons
Executive Director

Enclosures:
Program draft
Topic description form
Written materials guideline
Author release form
Audio-visual/room set-up form
Time schedule
TOPIC DESCRIPTION FORM
25th Annual Construction Law Conference

TOPIC DESCRIPTION SUBMISSION DEADLINE DATE:

*as soon as possible - brochure will be printed December 15, 2012*

☐ TOPIC TITLE: Leave as listed on the enclosed program draft date September 14, 2012.

☐ **OR** Change to: __________________________________________

                                                                             __________________________________________

DESCRIPTION (approximately 25 words):

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Please return this form *as soon as possible* to fax (512) 451-2911.