Trends in Course Materials –
How to Deal with Late Papers;
Moving Course Materials to Digital;
Distributing Materials in Advance

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Ms. Mary E. McDonald is a Program Coordinator at the State Bar of Texas. Prior to her career in Continuing Legal Education, she worked for over 20 years in management of numerous business ventures. With a B/S degree in Government with an emphasis in Paralegal from Texas Woman's University, Mary feels like she has found her true calling in the world of continuing legal education. Mary is very interested in every aspect of the programs she works on and recently completed a certification course with LERN to become a Certified e-Marking Professional. In addition to her Program Coordinator duties, she also over-sees the Sr. Written Materials Coordinator in her office and takes an active part in creating quality course materials for TexasBarCLE. When Mary is not working you will find her doing DIY jobs around her home, planting flowers and taking long walks with her only child, who happens to be a Chorkie, named Poppy.

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I.   INTRODUCTION

In 2011 I attended my first ACLEA conference in San Francisco and I was overjoyed to find out that there were so many people that had Program Coordinator jobs very similar to mine. It is amazing how cathartic it can be to talk to someone who goes through some of the same challenges every day that you do. I met people not only from all around the United States, but some from other countries as well, who manage continuing legal education programs and work with attorneys and volunteers on a daily basis.

I learned a very important lesson in my few days in San Francisco; that attorneys the world over are busy, over-committed, hard to get a hold of, often late, and can be extremely generous with their time in spite of all this. As do most of you, we depend on our experts to provide quality presentations to our registrants. Most often they do not disappoint, and it is our job to remind, cajole, encourage and pester their best performances out of them.

One of the primary issues that we all face revolves around the written articles that our volunteers produce for us. In the following pages we will discuss three hot topics that we must all work on to improve in our own CLE organizations. Successfully dealing with late papers, moving course materials to a digital format and getting materials out in advance, all by having a workable plan in place.

II.   HOW TO DEAL WITH LATE PAPERS
A.   Having a plan in place

During my first year as a program coordinator I learned through trial, error, and a little pain, that only informing an author of deadlines once or twice did not produce the results I desired: having all my course articles in by the deadline. Consequently I spent some late hours standing over the copy machine duplicating an article that came in at 5 p.m. (or later) for a course that began the next morning. I also had to endure negative feedback from our registrants when they had to pick up piles of articles and stuff them into their course binders, and some frowns from our budget coordinator when I used expensive copy services at hotels and other facilities.

Since the early days I have learned that there needs to be a better plan in place to pester and cajole my authors, while maintaining a friendly and supportive relationship. With the help of our team of program coordinators, written materials coordinators, and director, we have come up with a procedure that means a little more work and organization, but definitely produces positive results. The following information will not only help you to deal with late papers, but also lessen the number of late papers you receive.

B.   Communication
1.   Get a buy-in from the Course Director early so they understand our goals regarding timely articles and why.

If you are not having a conversation with your Course Director/Leader before the planning process begins, you should do so right away. As the leader of the event and one who has a good working relationship with the rest of the volunteers, they need to understand the

importance of quality substantive articles that are submitted in a professional and timely manner. If you don't have a leader who agrees that this is important and will commit to help you achieve your goals, then it might be wise to choose someone else who is.

2. **Always cover article guidelines at planning meetings and ask every confirmer to let the speaker know when they confirm them that articles are a requirement.**
    After we select a Course Director, they select a group of experts in the seminar field to attend a planning meeting in which topics and speakers are chosen to fill the program. Before we ever meet in person at this meeting, we draft a welcome letter to the committee to explain what their role is in the planning process. In this correspondence we always include the following information.

    - **course book materials are provided for every substantive presentation on the course, including panel presentations;**
    - **materials are comprehensive, research-worthy legal articles that will assist lawyers in their law practice**

    This information is also provided to them at the meeting in a hard copy agenda of all our guidelines. In addition to this, when the meeting occurs we introduce ourselves to the committee and discuss these guidelines verbally. In the past we have had some courses where materials were notoriously late and did not include much in the way of substantive articles and we have told the committee if they don't feel like they can ask one of their colleagues to commit to writing an article by the due date, then please provide us with the name and contact information and let us be the ones to make the contact.

3. **Send out a confirmation immediately to the speakers as soon as they are confirmed to welcome them and let them know the course details and article due date.**
    We started this particular step about two years ago and believe it to be one of the key steps in communication and expectations with our speakers. When your planning committee member contacts you to let you know they have confirmed a speaker, you should send out a confirmation to the speaker and the confirmer to welcome them and let them know the details. Here is an example of one that we send out.

    Re: Advanced Civil Trial 2013

    Dear «Salutation»:

    Thank you for accepting our invitation to speak at the upcoming **Advanced Civil Trial 2013** course. For your convenience, the dates and locations are listed below:

    July 17-19, 2013 at the Hyatt Hill Country Resort and Spa in San Antonio.
    Aug 21-23, 2013 at the Westin Galleria in Dallas
    October 30-Nov 1, 2013 at the Westin Oaks in Houston.

    Your Speaking Time Is: xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

Please note that **all written materials and bios will be due June 3rd**. Materials will be made available to the registrants in the form of a USB drive, or a traditional course book and it is critical that articles are received by the deadline for inclusion.

Please verify your address above and let me know if I need to make changes. A speaker letter with complete details and additional deadlines will be circulated to the faculty shortly, but please do not hesitate to call or email us if you have any questions before then. We look forward to having you on the program!

If you need special accommodations to speak or to attend the program, please let me know as soon as possible.

Being the first communication you have with your speaker, there is a pretty good chance they will actually read it! It also copies the person who made contact with the speaker and puts them on the spot if they neglected to inform the speaker that an article would be expected. No one wants to be embarrassed and it is better to find out early on if a chosen speaker doesn't want to meet the requirements so that we have plenty of time to find someone who will meet our expectations.

4.   **Send our regular reminders to the authors at set intervals (12, 6 & 2 weeks for example).** *(Keep it short!)*
We have created a timeline for each one of our courses that sets out specific dates for everything from planning meetings, to brochure mail dates, to article reminders. It is this timeline that keeps us on track as we work on numerous courses all at different stages of the planning process. After the faculty has been confirmed for our courses, we send out a speaker/author letter with all the details of the course including article expectations, travel information, facility information and complete contact information for our staff. *Our success rate has improved substantially since we began verifying addresses in the confirmation email.* About 10 days after this hard mailer goes out we then send a follow-up email that gives a synopsis of what was included in the snail mail correspondence and requests for them to let us know if they have not received their package in the mail. *(This is our 12 week correspondence).* See an example of this below.

Re: **Business Torts Institute 2011**
Houston – October 13-14, 2011
Westin (Memorial City) Hotel

Dear Business Torts Faculty,

Thank you for agreeing to participate on this popular annual course. You should have received your Author/Speaker Packets via mail, but if not, please let us know and we will resend immediately. We have also attached an electronic version of the author packet and the brochure for your convenience. **Please pay attention to the following important deadlines.**

ARTICLE IS DUE
Monday, August 29th your article is due. Please submit your article via email to me at mmcdonald@texasbar.com.
Do not to forget to include a one-page bio with your article submission. See the Author Instructions for more guidelines. If you have questions or need further help, please do not hesitate to call one of us. **If you are on a panel, check with your moderator to find out about your article responsibilities.**

HOTEL RESERVATIONS
Wednesday September 21st, hotel discount cutoff. Call the Westin Hotel at (281) 501-4300 and request the State Bar of Texas rate of $149 per night. Make your flight reservations as early as possible to obtain the most economical airfare.

POWERPOINTS ARE DUE
Monday, October 10th. If you choose to use power point and you e-mail your presentation to me by October 10th, so we can pre-load it onto a laptop that will remain at the podium throughout the day. It is always a good idea to bring a backup copy on CD or USB drive.

For more information on being a volunteer for TexasBarCLE, go to our Volunteer Resources Site.

Thank you for donating your time and expertise to this program. Without your help, we would not be able to offer quality CLE to the Bar's members.

By now you can assume they are probably tired of hearing from you about due dates and guidelines and it will be six weeks *(or whatever guidelines your organization sets)* before they should see or hear another peep out of you unless they contact you first. At about six weeks you should consider sending out a brief and friendly reminder. Here is an example of what we send.

Dear xxxx Faculty,

Just a friendly reminder that your **articles for this course will be due Monday, July 16th**. (Six weeks away). We have attached a copy of our author/speaker packet that includes information for your typist on the correct format and also includes reimbursement forms and information on getting free access to our [online library](#) for your research. (Please don't forget a brief bio also)

We have developed another very useful tool for our volunteers. An online site that may help you in your preparations and with any questions you may have. [Volunteer Resources](#).

If you are flying in, please go ahead and make your **flight arrangements**. *(Whenever possible, we ask that you book the least expensive fare. You can do this by booking air travel 21 days in advance, especially for out-of-state travel; one last minute ticket may cost as much as two advance-booked nonrefundable tickets!)* We also have an account with **Enterprise** for special rental rates of $34.50 plus tax. *(This amount includes insurance*) Go to www.enterprise.com and enter account code as xxxx and passcode as xxx.

Also, don't forget to make your **hotel reservations**. We will reimburse one night for each day you speak on the program.

Westin Hotel Galleria, 13340 Dallas Parkway, (972) 934-9494. $149 single/double room. Deadline: July 17th

Thanks to all of you for your willingness to participate on this program and we look forward to receiving your articles for this course.

And then, finally, we send out a two week reminder that will be ignored by some and produce panic in others! This reminder is short and sweet and right to the point. You should consider not putting anything else in this email except for the following:

Subject Line: Course Name + Articles Due in TWO Weeks

Dear xxxxxx Faculty,

Just a friendly reminder that your **articles for this course will be due Monday, February 18th**. (Two weeks away).

Thanks to all of you for your willingness to participate on this program and we look forward to receiving your articles for this course.

This last email usually produces a flurry of correspondence from speakers that range from a brief thanks for the reminder, to begging for extension time, to outright denial that they were ever informed that an article was required!

5. **Connect with the Attorney's staff and make sure they have all the due dates calendared**.

It is a good idea to know the support staff in the offices for your volunteers. We have several legal assistants that we copy on every bit of correspondence that goes out to the speakers. A lot of these people are the right hand for your speaker who depends on them to organize their schedules. Get to know them. Call their offices and ask to speak to Ms. "Speaker's" assistant and go from there. Introduce yourself and double check that they have due dates and speaking times calendared on their master to-do list. Your relationship with these folks goes a long way with them helping you with your attorney. Often if you work it right, they will do the reminding themselves as due dates draw near.

6. **Ask your Course Director to call or email the late authors.**

Here is where your preparatory work comes in very handy. When we send correspondence to our speakers and authors, they are often put on the back burner, but when they receive correspondence from the Course Director, it becomes a case of peer pressure, professional pride and a certain amount of respect (or lack of) from another attorney. Ask your Course Director to keep it friendly and ask what we can do to assist them in getting the article in quickly. A lot of times even a volunteer who has not returned any of your emails will promptly return one to the Course Director.

7. **Offer alternatives to your speaker/author.**

Our organization keeps an electronic library of all articles that have been submitted to us since 1998. This library contains thousands of articles that we have quick access to and legal rights to use in any of our courses. There have been many occasions when we have had an author who, due to lack of time or poor time management, hasn't been able to produce an article. We often go to our database and pull articles on similar topics and send to the attorney to **update** with current information, which is often much quicker than starting an article from scratch. Depending on how much time you have before your print deadline, but if the article is current enough, you can even **substitute** an article from a prior course into the current course materials. This online library is also a great starting point for new authors who need examples of what we are expecting and how to lay out their articles.

Another suggestion you could make to your volunteers who are time crunched is to **enlist a junior associate or clerk** on their staff to assist in research and even preliminary drafts of the article. *We have one speaker who uses their child, who is attending law school, to draft the first round of his articles.* This isn't as handy to solo practitioners as it is to those in large firms, but many attorneys and judges benefit from this suggestion.

As a very last option, we will grudgingly but graciously accept a **power point presentation** and convert it into a PDF format with note-taking space left for the course materials. This is a poor precedent to begin, because most power point presentations are

useless on their own without the benefit of someone speaking along with it. However, having said this, it is still better than having nothing in that chapter at all.

8.   No Article pages
      Several years ago we developed a cover sheet to place in our course books for authors who did not submit papers or did not submit them in time. Many times we have sent these "no article" pages to the print shop and copied the speaker so they will know what the registrants will see in their chapter. See an example below.

**NO WRITTEN MATERIALS FOR THIS CHAPTER
WERE AVAILABLE AT TIME OF PUBLICATION**

**This page was included simply to assign
the speaker a chapter number for evaluation purposes.**

1. If those materials become available during the course, our on-site staff will provide hard copies or instructions on how to access the materials electronically.

2. If they are available immediately after the course and your email address is on file as part of your State Bar membership records, we'll email you instructions on how to access the materials electronically.

3. Registrants can access course materials electronically at no additional charge in our *Online Library* at TexasBarCLE.com about 6 to 8 weeks after the course.

      This is friendly notification to registrants that it falls to the speaker to provide course materials in a timely manner. Some speakers reply to this submission, when they haven't responded to anything else, to ask us to try to hold up the print job. We try to work ahead of our due dates, so this is often possible. You might want to consider scheduling yourself enough leeway in your timeline to make these allowances.

C.   Keeping Records
      By following all these suggestions, I feel positive that you will see an increase in the number of on-time article submissions, as we have. There will always be a few of those in your flock that have issues getting papers in on time, or always submit a power point instead of an article, although they have been told that we don't consider this acceptable. You then have to decide how you are going to handle this special group. Do their knowledge and speaking skills warrant our forgiveness and allow them to keep speaking for us? Are they a V.I.P that we can't risk offending?

Regardless of their role in your organization, you should consider making notes and tracking these issues.   Whether you have a database that allows for a comment field or a spread sheet that you have put together, it is very helpful to document your problem authors. This is helpful to other program coordinators in your group who may take over the course, or for new staff that your group may hire in the future. We often use this information at our planning meetings to discourage these individuals from being added to a course by the planning committee. Weeding some of the non-compliers out of your system will help increase your success rate regardless of your attempts to communicate the deadlines.

III. MOVING COURSE MATERIALS TO DIGITAL

A. Having a plan in place
Some of us mentally kick and scream like children when we are faced with the prospect of a big project or a major change in our organized little lives. This is possibly where you are when you think about having to revamp your system to move into the new millennium and start producing course materials in an electronic format. With a little time and research and hopefully a few tips that you will find in this article, you will be much more prepared to take the next step.

1. Which format to choose?
You are probably aware that your competitors have been producing course books and burning materials to a DVD for some time. Some of your competitors may even be set up to duplicate onto USB drives or have a supplier who does it for them. Decide what your organization and customers would prefer before you take any other steps. See below for a few things you might want to know about each option to help make your decision.

a. DVD's: According to the Optical Storage Technology Association, most manufacturers claim that DVD+/-R discs can last for upwards of 100 years, while DVD+/-RW and DVD-RAM discs can store data for approximately 30 years.[1]

b. Flash Drives: Most tests done on flash drive longevity measure how many times the drive can be written on, not how long it can hold data. What research has been done suggests that flash drives can hold data for only 10 years at most.[1]

Having said this however, how long do they need really retain the information in this format? Storage and organizational issues may occur if you try to keep all the information on their original format. We encourage our customers to move the files over onto their desktops as soon as they get them.

Both of these formats can be purchased in bulk at reduced prices. Make sure you understand your storage needs before deciding what to buy. Different kinds of DVDs can store different amounts of data. Most DVDs can hold either 4.7 GB or 8.5 GB of data, but variations that hold both more and less data also exist. [2]

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[1] Read more: Are Flash Cards Better Than DVDs For Long-Term Storage? | eHow
http://www.ehow.com/facts_7262274_flash-better-dvds-long_term-storage_.html#ixzz2ThBBlg00

[2] Read more: How Much Storage Does a DVD Hold? | eHow http://www.ehow.com/facts_7620332_much-storage-dvd-hold.html#ixzz2ThDeMz60

As of October 2010, the maximum capacity of a flash drive is 256 gigabytes. Flash drives are also available in much smaller capacities including 512MB, 1GB, 4GB and 8GB.[3] One gigabyte can hold a raw 133,251 full pages and 5266 characters (or about 65% of another page)[4] We have never had course with materials that wouldn't fit on a 1GB or 215 KB flash drive, so don't overbuy capacity when you are looking to make your purchase.

We chose to go with flash drives when we started offering our materials in an electronic format about five years ago. We thought the size would be easier to handle, we wouldn't have to worry about scratches, and we thought registrants would see them as an extra bonus since they can be reused. We also began offering electronic materials at our larger courses, since the books for those can be so large and burdensome. We now offer an electronic format option for all of our courses.

2.   To hire an outside source or buy duplicators

Our first attempt at producing electronic materials was done through an outside vendor who operated very much like our vendor for our hard course books. Formatted articles could be submitted individually and then they would combine them and put them into a usable format and dub them onto the USBs. Much like the printer, there is not a lot of leeway in the time that they need to produce and ship the product, so we ended up in the same situation when articles did not come in on time; a blank chapter. And ultimately, we ended up making copies of the missing information and handing them out to registrants at the event. This was very frustrating and we perceived it as unprofessional and contrary to the purpose of going green and high tech.

Another process we tried was to load the late articles onto a dedicated web link so that the customers who choose the electronic version could simply download late articles directly to their USBs. This process is semi-successful and sometimes still used today, but with a few revisions.

After many meetings and discussions, we decided that the best idea would be for us to buy duplicators for our office and create the electronic versions ourselves. Although, eventually this plan worked, we struggled with learning and creating the process to combine our materials in a professional form of Adobe Acrobat, book marking and hyperlinking articles, and making them as user friendly as possible.

The first machines we purchased were small units that we gave to each of our written materials coordinators to place on their desks. These units were designed to duplicate up to 20 USBs at a time by using a software system that was supposed to be compatible with our operating system. We worked as best as we could with these systems for a couple of years, but as our organization continued to upgrade to newer computers and operating systems, we tried to

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[3] Read more: How Much Data Can a Flash Drive Hold? | eHow http://www.ehow.com/facts_7311657_much-can-flash-drive-hold_.html#ixzz2ThEES2xZ

[4] http://wiki.answers.com/Q/How_many_pages_of_text_will_fit_into_a_gigabyte_of_storage

look for a new solution. I am happy to report that now you can purchase USB duplicators that do not have to connect to your computers, thereby conflicting with networks or operating systems. This last purchase was our most successful and it what we use today to duplicate hundreds of USBs at a time. This particular unit that we use currently will duplicate up to 50 USBs in a matter of minutes. It takes longer to plug each of the units into the machine than is does to copy the material to each one.

With our new system in place, we can hold off on creating the final PDF version of our course materials until the very last minute and therefore include every article that comes in up to the day before the course. It is rare now that we ever give out hard copies to registrants who select USBs. With our new in-house system and posting articles to a web link, we have become much closer in reaching our hi-tech and "green" goal.

B.   Supplies and Training
As you begin to make plans to include electronic materials as a course materials option, you will now have to make some decisions, as we discussed above.

- ☐ USB or DVD
- ☐ In House Duplication or Vender Contract
- ☐ Vender for Bulk Order USBs or DVDs
- ☐ Purchase of Duplication Machines (If In-House)

A few words about USBs. USBs come in thousands of shapes and sizes with all kinds of cute colors and decorations. Whatever you decide to purchase for your organization, make sure they fit in your duplicator easily. You could make a 50+ unit duplicator effectively only work for about 20 flash drives at a time if you choose a style that won't fit into the designated slots. You might also want to consider ease of use. If a USB has a lid, you will have to remove all the lids, put them into the duplicator, and then reapply the lid after duplication and before distribution. Perhaps a swing arm type USB or a button slide would be your best choice.

| Yes | No | No | NO way! |

- ☐ Develop a format in which to organize your electronic course materials
- ☐ If you plan on using PDFs, you will need a professional version of Adobe Acrobat
- ☐ Decide on imprinting of the USB or DVDs.

In our office we still have a box of USBs from a course about four years ago that we now just use as in-office supplies. We thought we would try putting an imprint on each USB to designate the name of the course on one side and the name of our organization on the other. We found out quickly that in order to make sure that you have enough USBs on hand you have to duplicate about 10% over your registration totals. When you don't use them all you wind up with a bunch of useless USBs that have a name on them for a course that is over. Now we imprint the name of our organization on them only and reuse any left-over USBs from our courses. I just saved you a bunch of money if you take note of the above paragraph!

Depending on your organization's setup you will now need to train staff to use the duplicator and the software you have purchased. We did this as a group effort several years ago and are always looking for ways to make improvements. Listen to feedback from your registrants regarding ease of use and eventually you will have a format that will make them happy.

- ☐ Train your staff
- ☐ Get feedback from your registrants

We use a combined PDF that includes a master table of contents that is hyperlinked to each chapter also with easy access electronic book marks and is completely word searchable. One thing you might also consider is what type of format your audience will be using. They will probably be using a reader only version of Adobe that doesn't allow them to make any changes to the document, like highlighting and taking notes. The professional version of adobe will allow you to enable the PDF for comments and note taking capabilities.

- ☐ Decide on a roll-out date that is late enough for you to have time advertise it
- ☐ Create a tracking plan so that you know which registrants want electronic materials and which want the hard copy course book.
- ☐ How will you know what version to give to each registrant?

We are very fortunate in that we have a website manager who works with us to create options on our website to allow customers to make selections of criteria that we decide on. This has allowed us to offer a hard copy of our materials, and an electronic copy, or both. This information is recorded and prints out on our nametags for the registrants so that we know what type of materials to give to each person.

C. Implementation

After you have completed the above checklist and made your purchases, you are ready to roll out your new electronic course books. You will no doubt receive a mixed reaction from your customers. In my opinion there will be a need for the hard copy course books for at least another 30 years, because different people have different learning styles and those who didn't go to law school in the digital age will find it hard to adjust to studying in an electronic format. Younger attorneys' who have had smart phones and tablets most of their lives will embrace the new format as it will be easy to use and comfortable for them to do so.

☐ Train your customers

Most of your customers will know how to use a USB drive immediately. There may be an an open minded and progressive group of older attorneys' who will want try the electronic version to "stay up with the times", but more likely they just don't want to lug the heavy books around or store them. Regardless, you will need to develop a set of directions that you can provide to registrants when you hand out the USBs at a course that include moving the information over from the flash drive to their computers, how to navigate amongst the PDF, and how to make notes and highlight.

IV. GETTING MATERIALS OUT IN ADVANCE

If you had asked me a few years ago if we would ever be able to provide course materials in advance of a seminar to our customers I would have told you no. Recently we began doing so. After getting a plan in place to get our articles turned in in a more timely fashion and then creating electronic versions of the materials, we learned a lot that enabled us to take this next step.

Most of you will probably already have a website for your organization that you can add pages and functions to; however for those who do not then I would suggest that you research using a Google Docs account or a Dropbox type of account that will allow you to post files online and others to access them.

After putting a procedure in place to convert articles to electronic materials, this process is pretty simple. We were already formatting our articles and hyperlinking them and enabling them for commenting and note taking, now we have just added one more step by uploading them to a dedicated link for each course. We do this as the articles come in to us. After a customer has registered for a course, they can access this link at any time and download the available articles.

A week before our course, we email all of our registrants giving them information about the location of the seminar and a link to download these materials in advance. If articles come in late they are added to the online files and become available for download immediately. The following is the brief notice that we provide in our email to notify customers of this new service.

- **Access Digital Course Materials Prior to the Course**: Visit **TexasBarCLE.com**, and look in the middle section under **Your Online Library**. Below that heading, click on **My Course Articles**. Next, select the title of this course and click on topic titles to view each article. We will post any missing articles as they become available. Please note **you will need to log in** as a registered user of TexasBarCLE.com to access this feature.

A great service that we have been able to provide our customers is a complete history of their articles on our website.

This is also a great function for those who choose hard copy course materials, since they no longer have to worry about storing the books. After they use them at the seminar, they can discard them and always be able to go back to our website and download them again if needed.

Providing hard course books in advance would be very cost prohibitive and time-consuming. Some organizations may do this, but they risk having incorrect addresses, customers forgetting to bring the books to class, or never receiving them. My suggestion would be to provide a link as we have discussed above and handle issues with the hard copy user's one on one.

V. CONCLUSION

Staying up with the times is a never ending battle especially in the world of computer and technology. Don't be one of the ones that is left behind by not being willing or able to give your customers what they want. Communication plays a big role in the success of your organization, not just with each other but with your customers and volunteers. Don't be shy about picking up a phone and calling someone to remind them about due dates or ask for their feedback on a recent course. You might like what you hear.