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President's Column

Jeanne B. Heaton
President of ACLEA



I'm very pleased to send you greetings in my first President's Column since I "picked up the torch" in Montreal. We had a wonderful conference there, thanks to our hard-working planning committee chaired by Laura Selby. Kudos to them for bringing in a lot of new and dynamic speakers, as well as our standard stars, to bring us up to speed on a number of current topics for CLE professionals.

I'm really looking forward to serving you this year because ACLEA means so much to me. Since attending my first conference in Nashville in 2007, I've been amazed at my fellow ACLEA members – you are sharing and collaborative, you love education and learning, you are hardworking and energetic, and you are the reason ACLEA thrives as an association! I'm hoping to meet more of you this year and I welcome your ideas and suggestions for ACLEA as we embark on a membership recruitment campaign as well as continue to, hopefully, exceed your expectations as our current members.

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President's Column

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We do have a variety of projects in the queue and we are fortunate to have an outstanding ACLEA Executive Committee ("EC") ready to serve. Although we dearly miss our former President Una Doyle from Australia, we welcome some dynamic new members to the EC – Paul Unger (see pages 3 and 7), Kristin Houtari, and Gina Roers-Leimandt – who were each elected to two-year terms and are already hard at work. In addition to the membership campaign, we are exploring a joint project with CLEReg to co-sponsor some state-specific virtual provider conferences. We are also continuing our efforts to update the website as well as working on the final stages of getting our curriculum competencies project online. We will soon be posting an online version of Bootcamp, as well as exploring other online program options.

But don't worry, we haven't neglected our live onsite conferences. The planning committees are hard at work on San Antonio for February 2018 and Portland for July 2018. And based on your recent member survey responses, the EC is also looking ahead to some innovations for Mid-Year 2019, so stay tuned for those exciting new changes.

It's not too early to visit the ACLEA website where [registration is already open](#) for San Antonio! Bring your cowboy boots and your colleagues and join us for "A Brand New Era of CLE." You won't want to miss the fun, the networking, and the learning. I hope to see you in Texas!

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ACLEA website: www.aclea.org

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In the Loop is published quarterly by the Association for Continuing Legal Education (ACLEA).

ACLEA welcomes comments, article ideas, and letters.

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Get to Know Your ACLEA Executive Committee Member

Paul Unger

Affinity Consulting Group

1. What is your position with Affinity?

I am one of the founding partners. I handle continuing legal education, document management/paperless office, and law practice management consulting.

2. What did you do in your pre-CLE life and what brought you to the CLE world?

I was a full-time litigator with a law firm in Columbus, OH and started doing technology consulting with my partner, Barron Henley, back in 1997. Barron sold me my first PC in 1991, which was a 286 16 Mhz computer with 4 MB of RAM and an internal 44 MB hard drive with MS-DOS ver 4.01 and WordPerfect 5. He charged me \$1,500. I co-chaired our county's first legal technology seminar for CLE credit in 1994 while I was still a law student and invited Barron to talk about selecting the right computer, and I spoke about litigation technology and mobile lawyering tools.



3. How long have you been a member of ACLEA?

Since 2009 or 2010?

4. What do you remember from your first ACLEA meeting?

Honestly, Sean Carter being so funny...I was sooooo intimidated by Dawn Ofner because she is so wicked smart...thankful to Fran Wellington for introducing me to so many people...and how nice everyone was to everyone else.

5. What has surprised you most about being a member of ACLEA?

After being a part of so many committees, associations, and other organizations of attorneys, I guess that I am most surprised about how professional, cordial, nice, and generous everyone is toward each other. This group really shares information with each other more than any of the other associations I am part of. We all seem to want to truly help each other. I love that.

6. What other leadership positions(s) within ACLEA did you hold before joining the Executive Committee and what did you learn from (it/them)?

Planning Committee and then chaired the Savannah Mid-Year Meeting. I also chaired the Technology SIG.

7. What motivated you to become a member of ACLEA's Executive Committee?

LOL...Karen Lee.

8. What would you tell someone who is thinking about running for a position on the ACLEA Executive Committee?

Ask me in another 6 months.

9. What do you think is the most important issue facing CLE organizations today?

Traditional CLE organizations adjusting to the "moved cheese" and staying creative and relevant to lawyers. Technology has changed so many things from delivery to everyday management and marketing. New organizations have it easier in some ways because they can start by investing in the new platforms

Get to Know Your ACLEA Executive Committee Member

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and can turn on a dime. Legacy organizations are big luxury cruise ships...it takes a little bit more time and effort to turn in the right direction!

10. What do you think will change about CLE in the next five years?

A couple things. First, I think as Millennials enter the legal workforce, the learning methodologies that they are used to (from grade school to college) will need to make their way into CLE organizations (learning management systems, etc.). We need to learn from college and university/higher education models. Second, there is so much that law schools aren't able to fit into their curricula. There seems to be wonderful opportunities for advanced law certifications, paralegal certifications, legal technology certifications, incubators, etc., that we can be providing.

11. If you weren't involved in CLE, what do you think you would be doing instead?

I love teaching, so it would have to involve education in some way! I would love to teach underserved/underprivileged youth and give them a chance in life. It kills me to see poor kids get trapped with no chance to succeed. I should be doing this anyway!

12. What do you like to do when you aren't working?

Gardening, kayaking, and rehabbing old homes.

13. Tell us one thing that the ACLEA membership should definitely know about you.

I am recently single. If you know any nice, honest, and handsome gay men around my age who aren't sociopaths, give them my number! I'm getting old! Hurry up. LOL.

Meet Your SIG/Committee Chairs

Conor Jensen

TexasBarBooks

1. Which SIG or Committee do you currently co-chair?

I co-chair the Technology SIG.

2. How long have you been involved with this SIG or Committee?

I have attended the Tech SIG events at conferences since 2013 and started as co-chair in January 2017.

3. Why did you choose to join this SIG or Committee?

My job is to ease access and use of legal information through technological means. At its heart, it's about identifying problems and finding creative solutions for them. What better place than ACLEA to meet with minds doing the same thing and compare our notes?



4. What do you see as the main objectives of your SIG or Committee?

The main objective is to create a symposium-like atmosphere. We can only really dig into the work by forming connections, whether online or face-to-face, that help us understand how the members are serving their clients at their workplaces and what they are doing to tackle the issues that come up. All the technological information in the world is one Google away, but it's really the relationships with others in our industry that provide value beyond the information – that allow us to sense what information and tools are working and which ones aren't.

5. What has the SIG or Committee been working on recently?

I'd like to think we are always progressing the most by simply doing our jobs well! At the conference luncheons, for example, we are excited to swap stories of innovations and successes, welcome new members, and form personal and professional relationships that will make for effective communications during the rest of the year.

6. What is your SIG or Committee's biggest challenge right now?

I think, in the industry, we are fighting Amazon and Google user expectations with Wordpress budgets. There are plenty of great solutions available, and the market saturation for these tools runs so deep, with such variation in quality. So our biggest challenge is how to communicate to each other which tools are creating the most awesome things.

7. What resources would be helpful to your SIG or Committee right now?

Unless you have more time for us all, I think we are good!

8. What is the major reason why one should join this SIG or Committee?

Tech is a great area because all types of people have something to contribute! It might be a mistake to think that you must operate a computer at an advanced level to belong to a tech group. All experiences and levels of users belong. Good tech is more about using the things that work and getting rid of the things that don't. Basic users seem like our hardest segment to deal with day-to-day, but in truth they probably allow us to make the most progress! These folks should be more in on the conversation of tech design from the get-go.

9. What do you enjoy most in working with this SIG or Committee?

Meeting like-minded folks who are devoted to facilitating good legal education experiences. Legal education should be about good content and striking visuals! Not about account issues or website lag!

Member Moment

Donita Douglas

InReach

Professionally

Current Job: Executive Vice President of Client Success

A Recent Professional Victory: We partnered with the National Association of School Psychologists to provide training to school counselors in the hurricane-affected areas of Texas and Florida for working with the children dealing with the after effects of the storms.

Your Latest Challenge: Planning a user meeting that is relevant to everyone from executives to platform managers in various professions.

In My Pre-CLE Life, I Was: I was a practicing attorney. My practice included employment law, complicated family law, and appellate law. Also, I taught at Oklahoma City School of Law.

What Brought Me to CLE: The job looked interesting to me. I liked the business challenges and it was a good fit for my personality, dealing with lots of people.

Technologically Speaking

I Never Leave Home Without: My cellphone.

My Favorite Software: Professionally – InReach.

Personally – Word, because I like to write. Right now I am writing a children's book.

On My Wish List: Technology that would let me push a button and have the whole house cleaned.

Must-See Website(s): Vice.com

Personally

Recent Good Read: *Killers of the Flower Moon* by David Grann.

Favorite Pastimes: Sports! Attending football and basketball games.

Date(s) I Never Miss: OU –TX Football.

My Dream Vacation: Machu Picchu because of the mystery of it. How did it go so long without being discovered? Who were the people and how did they live?

Words I Live By: I always wanted to be a person to make a positive difference in other people's lives. Humor can get you through just about anything!



Productivity Pointers

By Paul J. Unger, Esq. | punger@affinityconsulting.com

The “NOT To-Do List” to Manage Tasks & Distractions

Social Media, Facebook, Instagram, client fires, 24-hour news, Trump, hurricanes, Trump, murders, Trump, crime, Trump, Russia, Trump, North Korea, 150 emails a day, constant interruptions...it's too much for us to handle and it is resulting in workday paralysis, even before you sit down to start your day!

In my seminars and my book, I outline many strategies to manage tasks and distractions. However, I thought it might be helpful to state them in a slightly different way...as a “NOT to-do list.” Here are 12 “NOTS” to keep yourself laser-focused:



1. Do NOT begin your day by immediately diving into email.

Instead, begin your day with a 5-minute private planning session. I use Self Journal™ for this and time block my day on paper, along with stating some 30,000-foot goals and reciting three things that I am thankful for. Put a plan together for your day before diving into email. You can always adjust as the day unfolds, but start with a plan.

2. Do NOT start your day without a team huddle. Instead of diving right into your email, or your first appointment or project, after your 5-minute planning session (see above), have a quick huddle with your immediate team. I call this the lightning round. Each person has 60 seconds to recite what they have going on today and for the rest of the week. This encourages communication, awareness of projects, and almost always results in shifting some tasks and schedules around to better distribute work and help each other.

3. Do NOT participate in meetings unless there is an agenda.

And certainly don't ever organize a meeting without one. I like to take it a step further and try to identify a goal or theme for the meeting to give it “purpose” or spark engagement. Whatever the case, showing up to a meeting that doesn't have an agenda and clear purpose is a recipe for wasting time and killing morale.

4. In meetings, do NOT say “I will get that done this weekend or tonight”! Why would you completely derail your personal life that way? Stop being a martyr and schedule these to-do items during the business day. We all need a life outside of work and making promises like this will kill your personal life.



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Productivity Pointers

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5. In meetings, do NOT let people ramble. We all know who these people are. They either don't prepare for a meeting, don't read the agenda and stay on task, or they just love to hear themselves talk. Everyone's time is valuable and deserves respect. When this happens, politely say "perhaps we can talk about this offline or record it as an issue to include on a future agenda so we can tackle the issues on our agenda today." Don't be too rigid about this though! There are times when spontaneous topics are important. Try to fit those spontaneous topics into an agenda item where the floor is open for items NOT on the agenda.

6. Do NOT keep your Outlook inbox up on your computer monitor all day! Your inbox is one of the most disruptive environments to place yourself in if you are trying to do project work or "deep" level work. It's like choosing to write a complex brief or letter in a war zone! Literally every 2-3 minutes, a bomb or a fire is landing in your inbox. How can one possibly focus in an environment like that? Instead, skim your calendar in the morning and decide how many times and for how long you can batch process your emails that day. Every day will be different. Aim for something reasonable like 5 times a day (the average American worker checks email an idiotic 74 times a day!).

7. Do NOT carry your phone 24/7. Let's face it, that smartphone is a ball and chain. If you don't believe me, take a phone "fast" by leaving your phone in the car's glovebox all day while you are at work. Let your loved ones know to reach you at the office phone in case of an emergency. **You will feel liberated.** It is incredible how often we check our phones during the day, and it is having a terrible impact on productivity.

8. Do NOT answer the phone from an unknown caller. Look, we never want to miss an important call. I get it, but you have to balance this rule appropriately. If your job is sales/business development, you probably will take more calls from unknown callers. If your job is more project work, you surely should take fewer calls. When we take calls from unknown callers, we run the risk of derailing our day by getting sucked into a conversation that we aren't ready for, or a similar situation. It is always a little dangerous.

9. Do NOT check social media 24/7. Check social media 1 or 2 times at the most during the workday (unless you are doing business development or marketing). In fact, think about taking a 30-day social media "fast"...and I mean all of it...Facebook, Instagram, LinkedIn, Tinder, Grindr...ALL OF IT. It is addicting and a huge productivity zapper.

10. Do NOT micro-manage and answer everyone's questions and solve all their problems! Empower the people that you work with to solve problems on their own and think for themselves. When co-workers come to you and ask what they should do, or how to solve a problem, the first thing out of your mouth should be "How do you propose that we solve this problem?"...or..."I want you to think about this and do a little research and present to me two or three possible solutions and then let's talk about it." We need to get our team members to a place where they know how to problem-solve and build their confidence enough to make more decisions on their own, or at a minimum, presenting the right recommendation to you.

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Productivity Pointers

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11. Do NOT multitask! It is not enough to say that multitasking is bad. We need to practice single-tasking. We need to clear off our desks AND our multiple monitors of information that are not directly relevant to the project that we are executing. One way to do this is using the Pomodoro technique. Pomodoro is an easy technique that utilizes the 25-minute tomato timer. We single-task (preferably deep-level work / project work) for 25 minutes and then take a break and do whatever we want for 5 minutes. In other words, we work in intervals. The human brain functions very well maintaining attention to a single task for 25 minutes. After 25 minutes, we begin to lose focus. By giving ourselves a 5 minute break, we can return to deep-thought work for another 25 minutes very easily. This technique will make a huge impact on productivity and will also help combat procrastination. Think about it...we can endure even the most tedious dreaded task for 25 minutes, right? Once we get a little momentum going and we get immersed in the project, it becomes a lot easier. If you feel like adjusting the time a bit, go for it. I usually do 40 minutes with a 10 minute break.

12. Do NOT do shallow work first thing in the morning. Tackle deep-thought work early in the day when you are rested. Dive into deep-thought work, writing, projects early in the morning. There is little question about it...our brains function better following quiet time or sleep. We also know that we can be highly productive while the rest of the world is sleeping because there are far fewer (if any) interruptions. This can be one of the most productive times of the day.

The Membership Corner

By Dennis Cuevas and Earl Dumitru

Membership Has its Privileges – Getting to Know the ACLEA Membership Committee

Ask any ACLEA member what they get from being a member and you will most likely get the following responses: excellent education at the Annual and Mid-Year Meetings, wonderful networking opportunities, robust information sharing, friendly colleagues, and unparalleled camaraderie. Why not share your love for ACLEA with others and join the ACLEA Membership Committee?

The Membership Committee focuses on recruiting members (including identifying targets and developing and maintaining a referral program), articulating a “business case” for ACLEA membership, onboarding new members, providing outreach to renewed members and member organizations, reaching out to lapsed members, and collecting information from members and prospects about their needs, expectations, and experiences.

The ACLEA Membership Committee is experiencing a resurgence of activity. For the Annual and Mid-Year Meetings, the Committee organizes the popular dine-around dinners with committee volunteers serving as dining “guides” for each restaurant. The dine-around dinners provide options for ACLEA members, especially new members, who may not have dining plans that evening to meet, socialize, and network with other ACLEA members. Participants simply sign up while at the meeting, meet in the lobby at the designated time, and head over together as a group to the restaurant. The dutch-treat dinners are typically held in casual restaurants that feature menus to suit all tastes.

Membership Committee members also staff concierge tables and act as bus escorts for transportation to and from planned ACLEA Meeting social events. Committee members also opt to wear lime green “Ask Me” buttons during the Meetings and either answer questions ACLEA members have or direct their inquiries to the proper individuals. By staffing concierge tables and wearing prominent “Ask Me” buttons, the Committee members can keep their fingers on the pulse of members’ needs, experiences, and expectations.

In the near future, the Membership Committee will work closely with the Membership Recruitment and Outreach Subcommittee, led by Gina Roers-Liemandt from the American Bar Association. While ACLEA currently enjoys a 90% member retention rate, new memberships are not increasing at robust rates. The Membership Recruitment and Outreach Subcommittee is charged with developing strategies and implementing those strategies to increase membership in ACLEA for the good of networking, diversity, and the budget. As the subcommittee continues its strategy planning, the Membership Committee will assist in the implementation.

If you are interested in joining the Membership Committee, please contact Dennis Cuevas at dcuevas@dcbar.org or Earl Dumitru at EarlDumitru@aloc.ca. Your active participation in the Membership Committee ensures that ACLEA remains a strong, relevant, and viable organization!

Join Us in San Antonio for the 2018 Mid-Year Meeting!

February 10 – 12, 2018

Hyatt Regency Hill Country | San Antonio, TX – U.S.A.



PLENARY SESSIONS INCLUDE:

- Bite Size Is the Right Size — The Move Toward Brief, Targeted Learning
- Steering the Stubborn Herd: Practical Lessons from the U.S. Military's Experience in Cultivating a Culture of Resilience
- From Microsoft to the Rio Grande: Using a Customer Success Mindset to Spur Innovation, Deliver Greater Value, and Provide Outstanding Service
- The Last Roundup: Best-of-the-Best Conference Recap

Register online today at aclea.org!

