

ACLEA

40th Mid-Year Meeting

January 31 – February 3, 2004

Westin Riverwalk Hotel

San Antonio, Texas

Choose from over 30 sessions
and 6 concurrent tracks:

In-House Programs
Leadership Marketing
Publications Technology

Presented by The Association
for Continuing Legal Education



Why You Should Attend:

A MESSAGE FROM THE PLANNING COMMITTEE

Join your colleagues for a respite from the winter weather, in the beautiful setting of San Antonio, Texas, and **treat yourself to a wide array of outstanding ACLEA educational sessions, packed with information you can use to make your organization more successful.** You'll have the opportunity to enjoy all that San Antonio has to offer. Visit the Alamo, experience the world famous Riverwalk, taste the amazing Southwestern cuisine, and enjoy the unique sounds of mariachi music. **You'll quickly see why San Antonio is Texas' most popular city—the perfect place to learn and explore.**

There is something for everyone at this meeting, whether you work on programs or publications, whether you are interested in technology, marketing, or leadership and administration issues, whether you are from a large organization or small, a law school or bar association, law firm, law department, or government office—we have included educational sessions in this program to benefit you. **We have made a special effort to cover new ground and feature new speakers.** Our plenary sessions are all first-time speakers at ACLEA, and are all outstanding presenters that the entire group will find enjoyable, edifying, and inspiring. They will focus on striving for excellence in all we do, on effective planning for greater success, and on looking at the big picture in CLE, from the other side of the table, the volunteer CLE leader's chair.

If you are interested in **publications**, you will learn how to:

- Build better books
- Better understand the needs of your customers
- Become more effective at product development
- Use the latest technologies
- Improve marketing efforts and profitability

Plus, you will receive 40 current author management letters, contracts and forms, on disk.

If **programs** are your thing, whether in the in-house context or the “public” CLE program sponsor setting, you will learn how to:

- Educate new litigators and transactional lawyers in their craft
- Create programs that will appeal to specialists
- Collaborate with foreign partners in creating programs of international reach
- Use loss leaders (subsidized programs) to provide a service to the profession and/or build your customer base

Those of you who work in the **in-house** setting will learn how to:

- Effectively teach legal research
- Build and manage your professional development team
- Achieve peak performance, more profits, and greater job satisfaction through a more effective evaluation process

Don't worry, we didn't forget about our more **technically** adept brothers and sisters. If you are one of them, you will learn about:

- The latest in technology resources for use at programs (and how to support your faculty in the use of such resources)
- The ideal portable video recording rig and the latest in digital video production techniques
- Improving the security of the computers and electronic records in your office
- The wonders and possibilities of DVD format

Plus, you will come away from this conference with great ideas on how to improve your Web site, based on an expert-guided tour of the best and worst we could find.

None of what we do would go very far without effective **marketing**.

- What's working and what's not working in the brave new world of e-marketing
- The best methods of selling subscriptions and renewals
- How to correctly and effectively conduct your own focus groups
- How to make your organization more customer-oriented and how to establish and capitalize on brand identity—both of which will help your business in a multitude of ways

Last, but certainly not least, we have some informative and thought-provoking sessions lined up for those in **leadership** and **supervisory** positions. In an era when organizational and business ethics are under close scrutiny, an expert on the subject will explore with you the fiduciary duties of CLE organizations. Other experts on our faculty will discuss how to:

- Engage your board members and staff in successful planning and implementation of plans
- Manage the rapid pace of change, with emphasis on developments in the areas of technology and cross-jurisdictional competition/collaboration
- Manage financial affairs in a difficulty economy
- Rev up the engine of your organization by unleashing the leadership potential of others on your staff.

Get practical knowledge and proven ideas that you can use to make your organization more successful. Register today for this exciting event and for your chance to experience the history, tradition and attractions of San Antonio!

Special Events Schedule

Saturday, January 31, 2004

12:30 p.m. – 4:00 p.m.

Historic and Cultural Tour

Many visitors to San Antonio are often amazed at the impact other nations had on the cultural character that is the Texan mystique. Like the original 13 states, Texas was occupied by men and women from Europe seeking freedom and an escape from oppression and the lack of economic opportunities. We will journey from San Antonio of the 2000s to an earlier period when there were more Germans than Hispanics. We will stroll the **King William District** where in the late 1800s this was the most elegant residential area in the city settled by prominent German merchants. We will visit one of the more prominent homes, the **Steves Homestead**. Here we will see antiques of the period as well as witness the simple methods used to make life comfortable. But of course, touring San Antonio would not be complete without experiencing the Spanish influence. We'll visit the residence of the Spanish officials, the **Spanish Governor's Palace**, where it became the seat of Spanish government in Texas in the 1700s. We will also stop and visit **Mission San José**, the "Queen of the Missions". Established in 1720, the mission became the most beautiful, most prosperous and best fortified of all Texas missions. We will end our tour at **El Mercado**, known as the Mexican Market. Established in 1894, this is the largest Mexican market outside of Mexico, with more than 125 shops that offer everything from the smart to the exotic, as well as dining and entertainment. Depart from the Westin Riverwalk lobby at 12:30 p.m. for this tour. **Cost per person \$30.00** with a minimum of 25 people required. Please make your required reservations on your registration form.

4:30 p.m. – 6:00 p.m.

New Member and Conference Faculty Reception

ACLEA members join together to welcome new members to the organization and show support for the San Antonio faculty.

Sunday, February 1, 2004

5:30 p.m. – 7:00 p.m.

Special Sunday Reception and ACLEA Revue! The ACLEA Revue Returns from Sabbatical!

A double-feature special event awaits you on Sunday, at the conclusion of the first day of sessions. Make plans now to attend the Sunday Reception (with complimentary hors d'oeuvres and hosted bar prior to the show), take advantage of an excellent opportunity for networking on the first day of the conference, and enjoy the renowned ACLEA Revue offering a unique insight through entertaining songs. Guest tickets are available for \$25.00.

Tuesday, February 3, 2004

6:30 p.m. – 9:00 p.m.

ACLEA's Closing Event – A Taste of San Antonio

Come and sample the flavors of San Antonio! Begin by networking with colleagues over cocktails then move to a sumptuous cultural dinner with fabulous entertainment! Our featured entertainment will include a Fiesta Mexicana Show with music supplied by a true traditional 10-member Mariachi Troupe presenting a bit of the history of San Antonio through the authentic traditional dances performed by beautifully costumed dancers. The grand display will include dances from the northern region of Mexico, "La Bamba" and the well-known "Mexican Hat Dance". Come and enjoy the Fiesta! Olé! Guest tickets are available for \$50.00. Please make your required reservations on your registration form.



Special Thanks to the San Antonio Planning Committee

Leslie A. Belasco, American Law Institute-American Bar Association

John E. Claydon, Osgoode Hall Law School - York University

Mary Conibear, Continuing Legal Education Society of British Columbia

Lana Corll, Loyola University, New Orleans School of Law

Ami L. Larson, State Bar of Texas

Richard Diebold Lee, Richard Diebold Lee Consulting, Co-Director, CLE Europe, Ltd.

Patrick A. Nester, State Bar of Texas

Dorothy M. Palazzo, Jones, Day, Reavis & Pogue

John M. Reilly, Massachusetts CLE, Inc.

Jonathan M. Vogt, Continuing Legal Education Society of B.C.

Leigh C. Webber, Practice Management Institute, Inc.

Carolyn L. Wepfer, Pennsylvania Bar Institute

John Redenbaugh, Liaison from ACLEA Executive Committee, Washington State Bar Association

Donna J. Passons, Executive Director, ACLEA

Vince O'Brien (Planning Committee Co-Chair) Minnesota CLE

Terry J. Brooks (Planning Committee Co-Chair) New York State Bar Association

Saturday, January 31, 2004

- 8:15 a.m. – 4:15 p.m.
CLE Boot Camp
- 12:30 p.m. – 4:00 p.m.
Optional Tour – Historic and Cultural Tour
- 2:00 p.m. – 3:30 p.m.
Executive Committee – Open Forum with ACLEA Members
- 4:30 p.m. – 5:30 p.m.
Denver Planning Committee Meeting
- 4:30 p.m. – 6:00 p.m.
Reception in Honor of Faculty and New Members

Sunday, February 1, 2004

- 8:00 a.m. – 9:30 a.m.
ORACLE/ACLEA Joint Working Group on MCLE Uniformity
Selected SIG Meetings (In-House, State & Provincial Bars, Law Schools)
- 9:30 a.m. – 10:00 a.m.
Networking Break and Exhibits
- 10:00 a.m. – 10:20 a.m.
President's Welcome
- 10:20 a.m. – 12:00 noon
Plenary Session
Achieving Excellence – How to Pursue the Dream
- 12:00 noon – 1:30 p.m.
SIG and Committee Chair Luncheon (ticketed event)
First Time Attendee Luncheon (ticketed event)
- 1:30 p.m. – 2:30 p.m.

WORKSHOPS A

In-House

Achieving Peak Performance: Using the Evaluation Process in Law Firms to Increase Performance, Profit and Professional Satisfaction

Programs

Developing Programs for New Litigators

Publications

Building Better Books

Marketing

E-Mail Marketing That Works

Technology

Technical Resources and Support for Faculty and Registrants

- 2:30 p.m. – 3:15 p.m.
Exhibit Hall Showcase

- 3:15 p.m. – 4:15 p.m.

WORKSHOPS B

Executive Leadership

Fiduciary Duties in Organizations: Living and Working in Glass Houses

Publications

Understanding Lawyer Needs—The Foundation for New CLE Product Development

Programs and In-House

Developing Programs for New Transactional Lawyers

Marketing and Publications

Selling Subscriptions and Renewals

Technology

Lights, Camera, Talking Heads: The INS & OUTS of Videotaping CLE Seminars

- 4:15 p.m. – 5:15 p.m.
Committee Meetings (Member Services, International)
MCLE Committee
- 5:30 p.m. – 7:00 p.m.
Special Sunday Reception and ACLEA Revue!

Monday, February 2, 2004

8:00 a.m. – 4:30 p.m.

Registration and Exhibits

8:00 a.m. – 9:00 a.m.

Committee Meetings (Exhibitor & Sponsors, Public Interest)

ORACLE/ACLEA Joint Session

9:00 a.m. – 10:30 a.m.

Plenary Session: Scenario Planning for the Future of CLE

10:30 a.m. – 11:00 a.m.

Networking Break and Exhibits

11:00 a.m. – 12:00 p.m.

Plenary Session (continued)

12:00 p.m. – 1:30 p.m.

SIG Lunches (ticketed event)

(Executive Leadership, Marketing, Publications,
Technology)

1:30 p.m. – 2:30 p.m.

WORKSHOPS C

Programs and In-House

Developing Programs for Specialists

Technology

Security for Your Computers and Electronic Records

Executive Leadership

The Future of Education

Publications

Get 'Em While They're Hot! 40 Current Author

Management Letters, Contracts & Forms on Disk

Marketing and Programming

Creating Winning Seminars—23 Ideas That Work and 11
That Don't

2:30 p.m. – 3:00 p.m.

Networking Break & Exhibits

3:00 p.m. – 4:00 p.m.

WORKSHOPS D

In-House

Building and Managing Your Professional Development

Team

Executive Leadership

Change Management with View to Educational Technology

Including Working in Cross-Jurisdictional Boundaries

Publishing

Avoiding the Technology Graveyard! O Pioneers!

Programs

Loss Leaders: Which Programs Should Your Organization
Subsidize?

Technology

CLE Web Sites—the Good, the Bad, and the Ugly

Tuesday, February 3, 2004

8:00 a.m. – 4:30 p.m.

Registration and Exhibits

8:30 a.m. – 10:00 a.m.

ACLEA Business Meeting, Breakfast

10:00 a.m. – 10:30 a.m.

Networking Break & Exhibits

10:30 a.m. – 12:00 p.m.

Plenary Session: A View from the Chair

12:00 p.m. – 1:30 p.m.

SIG Lunches (ticketed event)

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

1:30 p.m. – 2:30 p.m.

WORKSHOPS E

Publications

Marketing of Publications: 21 Vital Tips on 7 Timely
Topics

Programs and In-House

Globalization and Developing International Programs

Executive Leadership

Managing Cash and Reserves When Funds Are Tight

Marketing

Customer Focus: We Aim To Please (Who?)

Technology

DVD Production

2:30 p.m. – 3:00 p.m.

Networking Break & Exhibits

3:00 p.m. – 4:00 p.m.

WORKSHOPS F

Executive Leadership

Getting the Wheels Turning in Your Organization

Marketing

Focus Groups

Programs and In-House

Teaching Legal Research

6:30 p.m. – 9:00 p.m.

ACLEA's Closing Event – A Taste of San Antonio

*Welcome to
San Antonio*

OPTIONAL EVENT

Saturday, January 31, 2004

12:30 p.m. – 4:00 p.m.

Historic and Cultural Tour

The 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 Boot Camp has met with rave reviews and ACLEA is committed to continuing this service to its members. The sessions within the Boot 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”.

Presiding: *Barbara Armstrong — Alaska Bar Association*

8:15 a.m. Continental Breakfast

8:30 a.m. Introductions and What You Hope to Gain as an ACLEA Member

8:45 a.m. Program Planning from A to Z – contacts and resources; deciding on subjects, content, faculty and formats; budgeting and pricing; timelines and deadlines; analyzing your results.

Leslie Lynn Meyers — State Bar of Texas

10:00 a.m. Break

10:15 a.m. Marketing 101: How to Effectively Market Your CLE Seminars – The basics of direct mail, e-mail marketing, telemarketing, print advertising, Web advertising...you’ll see how to track your results and your ROI.

Vince O’Brien — Minnesota CLE

11:15 a.m. Technology and CLE – Technology affects every aspect of the CLE organization. Learn how to maximize technology in your day-to-day operations, programming, marketing, publications, and Web site presence. Find out how your audience can contribute to the improvement of your technology products, and learn how to assess what type of technology “works” for your audience. Filled with tips and tricks, this session helps make the most of what you already have while it also looks to the future of CLE and technology.

Ginger Shepard — Illinois Institute for CLE

12:00 p.m. Networking Luncheon

1:15 p.m. Publications – So you want to publish CLE books? Here’s an easy way to set up book publications, including finding authors, getting a manuscript written, editing, pre-press production, marketing and working with vendors to get your book printed.

Holly Garland Langworthy — Minnesota CLE

2:00 p.m. Break

2:15 p.m. The MCLE Application and Reporting Process – Are you being asked questions you simply can’t answer about different state MCLE requirements? Are you looking for ways to simplify the application and reporting process? Find out how to work with accreditation agencies.

David Shearon — Tennessee Commission on CLE and Specialization

2:45 p.m. Negotiation Techniques – Even if you aren’t the person involved in negotiating for hotels, speakers, supplies, etc., this session will help you understand how important good negotiation skills are to our profession. Learn how to avoid clauses in hotel contracts that cost your organization money, and how to cut expenses on-site. See the newest in sample hotel contract language that minimizes risk and expenses for your CLE organization. This session will bring you very practical and easy to apply techniques for maximizing your on-site dollars, avoiding risk for your organization and creating a win-win situation for all parties involved.

Donna J. Passons — Texas Institute of CLE

3:45 p.m. Panel of Experts

4:15 p.m. Adjourn

4:30 p.m. – 6:00 p.m.

Reception in Honor of Faculty and New Members

ACLEA members join together to welcome new members to the organization and show support for the San Antonio faculty members. Join us, make new contacts and plan an evening together to further your networking opportunities!



Questions?

**Call or e-mail ACLEA headquarters at
(512) 453-4340 or aclea@aclea.org**

Register By:

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

☎ **Fax: (512) 451-2911**

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

8:00 a.m. – 5:00 p.m.

Registration and Exhibits

8:00 a.m. – 9:30 a.m.

ORACLE/ACLEA Joint Working Group on MCLE Uniformity

Selected SIG Meetings

In-House — Professional Development Plans for Associates: Why use plans?; Using internal and external CLE resources in your PD plans; Partnering with CLE providers to meet the plans.

Moderators: David Cruickshank and Bronagh Fay

State & Provincial Bars — “Show and Tell” Roundtable Discussion.

Moderators: Thomas E. Dixon and Jonathan Small

Law Schools — Join this session for two lively team presentations: CLE TRIAGE – what to do when everything changes days before a program. ONLINE OR OFF: Are you still thinking about offering programs over the Internet but can’t decide if now is the time? A look at some of the myths and truths about CLE offered “on demand.”

Moderators: Anita K. Hamlett and Jan Majewski

9:30 a.m. – 10:00 a.m.

Networking Break and Exhibits

10:00 a.m. – 10:20 a.m.

President’s Welcome

Mark T. Carroll, ACLEA President

10:20 a.m. – 12:00 noon

Plenary Session

Achieving Excellence — How to Pursue the Dream

Many of us strive for “excellence.” David Gross will give his unique perspective on this important concept, including how to foster, recognize, and achieve excellence. David Gross is an acclaimed national speaker on trial advocacy and intellectual property litigation. He has enthusiastically presented seminars for the American Conference Institute, AIPLA, the Federal Bar Association, PLI, and several state bar associations. He is also one of Faegre & Benson’s lead trial lawyers for complex intellectual property cases and the coauthor of *The Power Trial Method*, a book on advanced trial practice to be published by NITA. He is a graduate of the University of Minnesota, *summa cum laude*, and Harvard Law School, *magna cum laude*. He is consistently rated as one of the best CLE speakers in the country.

David J. F. Gross—Faegre & Benson, LLP

12:00 p.m. – 1:30 p.m.

Luncheon Break

SIG and Committee Chair Luncheon (ticketed event)

All Special Interest Group Chairs and Committee Chairs are encouraged to attend this luncheon. *By Invitation and RSVP only.

12:00 p.m. – 1:30 p.m.

First-Time Attendee Luncheon (ticketed event)

All ACLEA first-time attendees are encouraged to attend this great networking opportunity. *By Invitation and RSVP only.

1:30 p.m. – 2:30 p.m.

WORKSHOPS A

In-House

Achieving Peak Performance: Using the Evaluation Process in Law Firms to Increase Performance, Profit, and Professional Satisfaction

Are your lawyers and staff motivated, engaged, and constantly striving to do their best? Do they treat performance reviews seriously or cynically? This program will show you how an effective performance evaluation system can promote high performance, increase lawyer productivity, reduce turnover, and make your firm a more profitable and satisfying place to work.

Ida O. Abbott—Ida Abbott Consulting

Programs

Developing Programs for New Litigators

The very best litigation workshops for beginners replicate a frank, constructive mentor/mentored relationship. The new litigator hears lectures, sees demonstrations, and then gets on his or her feet before coaches, judges, experts and peers in a safe environment to simulate a first-time courtroom experience. The challenge to your CLE is to turn out confident advocates who are “ready for trial.” Is your CLE as successful as it could be in helping new litigators on their way?

David A. Sonenshein—Temple Univ., James A. Beasley School of Law

Garry Watson—Osgoode Hall Law School

Howard Bruce Klein—Law Offices of Howard Bruce Klein

Publications

Building Better Books

Build better books, improve profits, and shorten your workday. Create and select stronger ideas, obtain high-value manuscripts, reduce returns, increase your marketing response, and do it all in fewer hours. You will learn high-impact title development and marketing strategies that have proven themselves. Come prepared to quickly share a successful title, timesaving shortcut, or proven marketing technique.

Jim Pawell—James Publishing Inc.

Marketing

E-Mail Marketing That Works

Understand all aspects of a successful e-mail marketing campaign including how to access addresses, dealing with opt-out options, format and content tips, use of links, effective subject headers, tracking responses, scheduling issues, and technical aspects. Take this opportunity to ask questions and share ideas about your own e-mail marketing practice and walk away with the information you need to most effectively make use of this modern day marketing technique.

Mark T. Carroll—ALI-ABA

Ami L. Larson—State Bar of Texas

Barbara Y. Tong—Osgoode Hall Law School

Technology

Technical Resources and Support for Faculty and Registrants

Many lawyers, speakers and registrants use laptops regularly, but our seminars lack even the minimal facilities for laptop users. What can we do to make our seminars attractive to the technophile lawyer?

- Network and Internet connections for faculty
- Room sound connections for speaker’s laptop
- Checklists for connecting to data projector and room sound
- Configuration guides for connecting to the network
- On-site staff support
- Wireless Network and Internet connections for registrants
- Providing power for registrants’ laptops
- Doing all of this in non-owned venues

Leigh Webber—Practice Management Institute, Inc.

2:30 p.m. – 3:15 p.m.

Exhibit Hall Showcase

Want another opportunity to win a FREE ACLEA meeting registration? Then come to the exhibit hall during this time and become eligible for the drawing to receive a free registration for ACLEA's 40th Annual Meeting in Denver. You will not want to miss the opportunity to learn about the products and services offered by the exhibitors and sponsors who help support our ACLEA meetings.

3:15 p.m. – 4:15 p.m.

WORKSHOPS B

Executive Leadership

Fiduciary Duties in Organizations: Living & Working in Glass Houses

This workshop will focus on the ethical conflicts and dilemmas facing CLE organizations as the field of continuing legal education faces new stresses from without and within. Among the topics covered: the sometimes conflicting duties owed to the public and the profession; building and eroding trust; the tension between CLE as a business and as a service; the ethical limits of marketing and advertising, and more.

Jack Marshall—Pro Ethics, Ltd.

Publications

Understanding Lawyer Needs—The Foundation for New CLE Product Development

User and task analysis for product design and development, for small to medium-sized publications departments. A market analysis workshop: how to gather information about your customers' general legal information needs as well as the demands of specific practice areas. Learn effective techniques for gathering customer information needs, including the typical tasks carried out in specific practice areas such as litigation, business, real estate, estate planning, and family law.

Gregory J. Smith—Bradford Publishing Company

John M. Lawlor—Massachusetts CLE, Inc.

Lynn P. Chard—Institute of Continuing Legal Education

Programs and In-House

Developing Programs for New Transactional Lawyers

Law firms know that placing an inexperienced lawyer in charge of a complex business transaction is risky business. Usually, the skills of a highly effective deal-maker are acquired incrementally, over many years of gradually increasing responsibility. Each transaction teaches the associate a new and valuable lesson in drafting techniques, negotiation strategy and client relationship building. Find out how CLEs can substantially shorten the learning curve, helping law firms to achieve a better "ROI" on their new associate talent pool.

Stephen V. Armstrong—Wilmer, Cutler & Pickering

Tina L. Stark—In-House Legal Education, Inc.

Marketing and Publications

Selling Subscriptions and Renewals

- How you market a subscription versus a one-off course or publication
- How do you keep people coming back?
- What is your rate of renewal?
- Specific examples on how much of total revenue comes in by subscription, broken down by course or publication and Web or print
- Issues that come up with online subscriptions:
How did you determine pricing for online subscriptions?; Do you bundle it with print?; Were there difficulties with selling online subscriptions that you don't encounter with print, and vice versa?

Pamela J. Jester—Continuing Education of the Bar

Valerie Merrihew—Illinois Institute for CLE

Technology

Lights, Camera, Talking Heads: The INS & OUTS of Videotaping CLE Seminars

This workshop will outline the process and technical requirements for videotaping live seminars. Discussion points include: Personnel – production companies, staff, DIY; Video production equipment – consumer vs. professional; Single camera & multi-camera production; Recording formats – tape, drives, DVD; Incorporating computer graphics and/or PowerPoint; Post-Production – editing hardware/software; Duplication – VHS, CD-ROM, DVD; Distribution – satellite, video streaming, web casting; New technologies; Troubleshooting locations – working with hotels and other venues.

Paul Burks—State Bar of Texas

4:15 p.m. – 5:15 p.m.

Committee Meetings

(Member Services, International, MCLE Committee)

5:30 p.m. – 7:00 p.m.

Special Sunday Reception and ACLEA Revue!

The ACLEA Revue Returns from Sabbatical!

A **double-feature special event** awaits you on Sunday, at the conclusion of the first day of sessions. Make plans now to attend the **Sunday Reception** (with complimentary hors d'oeuvres and hosted bar prior to the show), take advantage of an excellent opportunity for networking on the first day of the conference, and enjoy the renowned **ACLEA Revue** offering a unique insight through entertaining songs.

Monday, February 2, 2004

8:00 a.m. – 4:00 p.m.

Registration and Exhibits

8:00 a.m. – 9:00 a.m.

Committee Meetings

(Exhibitor & Sponsors, Public Interest)

8:00 a.m. – 9:00 a.m.

ORACLE/ACLEA Joint Session: Update on Hot Issues

Don't miss this opportunity to exchange ideas and concerns with providers and regulators regarding hot issues in MCLE.

Anita Otero—ORACLE President

Kristen Hamilton—Joint Working Group on Uniformity

Donna Passons—ACLEA Executive Director

Barbara Armstrong—ACLEA Liaison to ORACLE, Moderator

9:00 a.m. – 10:30 a.m.

Plenary Session

Scenario Planning for the Future of CLE

Scenario planning, a tool as old as military war games, became famous as a corporate planning tool when Royal Dutch Shell used it to grow significantly during the oil crisis of the late 1970s and early 1980s, and Peter Schwartz wrote his book, *The Art of the Long View*. Stuart A. Forsyth, is a visionary futurist and a veteran bar executive. He served as Executive Director of the State Bar of Arizona for three years, and in various legal and senior management positions at the State Bar of California for 24 years. He has completed the coursework for a Masters Degree in Studies of the Future from the University of Houston and currently is teaching at the University of Phoenix, both in the classroom and online. He was selected to serve as consultant to the American Bar Association's Futures Committee in its recent study of the future of the profession.

Stuart A. Forsyth—The Legal Futurist

10:30 a.m. – 11:00 a.m.

Networking Break and Exhibits

11:00 a.m. – 12:00 p.m.

Plenary Session (continued)

12:00 p.m. – 1:30 p.m.

SIG Luncheons (ticketed event)

Executive Leadership – Roundtable Discussion of Leadership Issues. Moderators: Lawrence J. Center—Georgetown University Law Center and Abena Buahene—Saskatchewan Legal Educational Society, Inc.

Marketing—The Good, The Bad and the Ugly. . . A Real Texas Round-UP Join Anita Hamlett and Kim Pate from The Alabama Bar Institute for Continuing Legal Education in a round-table discussion of successful marketing strategies. It's sure to be a knee-slapping good time! B.Y.O.B – Bring your own brochures, posters, pamphlets or what ever spins your spurs. Theme prizes will be awarded based upon:

- THE GOOD (The “Rootin’ Toot’ nest” Award)
- THE BAD (The “Badder than Ol’ King Kong/Meaner than a Junk Yard Dog” Award), and
- THE UGLY (A Marketing Award “Only Your Mother Could Love”)

Publications—Roundtable Discussion of current problems faced by publications directors and their staffs. Moderators: Terry Burnett—CLE South Carolina Bar and Craig Shaw—The Florida Bar

Technology—Roundtable Discussion of hot topics and trends in technology and CLE. We’ll explore the newest hardware and software being used by CLE organizations to create products and serve customers. Moderator: Ginger Shepard—Illinois Institute for CLE

1:30 p.m. – 2:30 p.m.

WORKSHOPS C

Programs and In-House

Developing Programs for Specialists

Chances are, your CLE already excels at developing annual, basic-level, “bridge-the-gap” introductions to the practice of law. But are you fulfilling your mission to the rest of your bar? By neglecting the specialists and high-end practitioners, are you leaving “money on the table”? The legal profession is witnessing an emerging trend of specialization as GPs move into boutique firms and more sophisticated practitioners retool their firms to concentrate on what they do best. How can CLEs help? What are the “hot” topics for specialists? What options do traditional CLE providers have to collaborate with high-end providers? And what sorts of speakers most attract high-end CLE consumers?

Sandra R. Geller—Practising Law Institute

Frank V. Harris—Minnesota CLE

Elaine M. Ohlson—Testa, Hurwitz & Thibeault, LLP

Technology

Security for Your Computers and Electronic Records

Hackers, worms and viruses are a constant threat. This workshop will cover: Examples of recent incidents; How malicious code gets into your computer system; Do hackers see you as low-hanging fruit?; Technical safeguards; Policies and procedures (automated virus signature updating, keeping systems patched and updated, first response to an incident, etc.).

Timothy J. Harrison—Symantec Security Services

Executive Leadership

The Future of Education

As a follow-up to the plenary session, Stuart Forsyth, The Legal Futurist, will explore the future of education in America. Continuing legal education is a segment of the much broader field of education. What changes are occurring in education as a whole, and how might they impact CLE?

Stuart A. Forsyth—The Legal Futurist

Publications

Get ‘Em While They’re Hot! 40 Current Author Management Letters, Contracts and Forms on Disk

As a CLE editor you constantly rely on the kindness of strangers. And until you’ve got the manuscript in hand, you’ve got nothing. Three seasoned CLE editors present a bank of up-to-date author contracts, copyright waivers, recruitment letters, letters to encourage sleeping contributors and address troublemakers, and other documents and strategies that will speed you several steps ahead in the game.

Judith Knight—State Bar of Wisconsin

Dawn McKnight—Continuing Legal Education in Colorado, Inc.

Sherry Priest—State Bar of Texas

Marketing and Programs

Creating Winning Seminars—23 Ideas That Work and 11 That Don’t

This session will provide you with a wealth of good ideas for putting together seminars and advertising materials that improve attendance, improve program quality, elevate the “experience” of attendees, and increase the bottom-line net profit from your courses.

Jeffrey H. A. Johnson—Minnesota Continuing Legal Education

2:30 p.m. – 3:00 p.m.

Networking Break and Exhibits

3:00 p.m. – 4:00 p.m.

WORKSHOPS D

In-House

Building and Managing Your Professional Development Team

Whether you come from a professional development team of 15 or are a one-person operation, you need to maximize the resources available to you. Learn the skills needed to run a creative, cost-effective, and time-efficient professional development operation. Topics will include how to capitalize on time and work management tools, structuring staff responsibilities, leading by example, collaborating with partners and committees, and staffing and budgeting concerns and opportunities.

James P. Hargarten—Thelen Reid & Priest LLP

Executive Leadership

Change Management with View to Educational Technology Including Working in Cross-Jurisdictional Boundaries

In terms of CLE, we tend to be trapped by the perception that the market is restricted to traditional delivery options within the boundaries of the state or profession. If our product is information to help the lawyer succeed, then there are both new opportunities for expanded program deliveries within your jurisdiction through additional technologies, and expanded markets outside your jurisdiction for your programs with national appeal or reach. These opportunities also include cross selling to other professions within your state. Learn how to consider and integrate these options relative to your current marketing goals and resources, with specific references to successes seen in other jurisdictions.

John Davis—LegalSpan, Inc.

James Carder—Business Professionals Network

Publishing

Avoiding the Technology Graveyard! O Pioneers!

A session for non-techies presented by those with one foot in the tech world and one foot on the printed earth. How does a small books department with a limited budget prepare prudently for the second coming of the electronic world and not get left behind? Learn how to assess and develop a viable business model. The new version of Word has invested heavily in XML: what does this mean for you? How does a non-techie negotiate, supervise and otherwise deal with the techies?

Pamela J. Jester—Continuing Education of the Bar

Paul F. Wood—Legal Education Society of Alberta

Yvette Harms—Institute for Continuing Legal Education

Programs

Loss Leaders: Which Programs Should Your Organization Subsidize?

It's one of the major challenges of CLE programming: Carrying out one's service mission while playing watch dog to one's bottom line. This presentation helps you devise a "decision tree" for determining when to forgo profit to fulfill mission. Find out how a "loss leader" program can improve your CLE's image; target new market segments; lead to post-program sales, encourage collaboration with desirable partners or excite traffic to your Web site. Get pointers on the best ways to market loss leaders to make them appeal to the broadest base of lawyers.

Jonathan Small—Massachusetts CLE, Inc.

Cecil L. Caulkins—The Missouri Bar

Technology

CLE Web Sites: The Good, the Bad, and the Ugly

An online tour of CLE Web sites, with critical commentary. Shopping cart; Product and seminar calendar or catalog; Useful content; Online delivery of content (seminars, publications, etc.); Affiliation features (discussion forum, newsletter signup, special features for registered users, etc.); Graphic design; Navigational features.

Tom Preston—Computer Consultant

Martin J. Chait—State Bar of Texas

12:00 p.m. – 1:30 p.m.

SIG Luncheons (ticketed event)

In-House – Roundtable discussion. MCLE training and development. Moderators: David Cruickshank and Bronagh Fay

Law Schools – Share what your most successful seminars and conferences have been in this changing economy. What innovative marketing strategies have you employed? Bring sample brochures of your successes to share with the group. Moderator: Liz Stephens

Local & Specialty Bars – Roundtable discussion. Moderators: Gwyn Byrd and Michelle Schwartz-Clement

Nationals – Join us for a round-table discussion where participants are encouraged to share ideas and express concerns within the national CLE marketplace. Discussion topics are welcomed in advance. If you haven't been able to join us recently, please visit the ACLEA Web site (National SIG) to view notes from the prior meetings. Moderator: Amy Danziger Shapiro (adshapiro@ali-aba.org).

State & Provincial Bars – Roundtable discussion: "Show and Tell" Moderators: Thomas E. Dixon and Jonathan Small

1:30 p.m. – 2:30 p.m.

WORKSHOPS E

Publications

Marketing of Publications: 21 Vital Tips on 7 Timely Topics

An experienced CLE panel addresses seven pressing marketing issues for our times; effectiveness of: (1) joint programs and publications marketing; (2) Web site and e-mail marketing; (3) print catalogues and publications lists; (4) book fliers; (5) target marketing; (6) print ads; and (7) testimonials and book reviews. This session will focus on marketing initiatives that produce the best results, and those that often don't work well.

Carla Council—The Missouri Bar

Thomas M. Strassburg—Virginia CLE

Jonathan M. Vogt—CLE Society of British Columbia

Programs and In-House

Globalization and Developing International Programs

The training needs of corporate in-house counsel and lawyers with international practices are many. The global practice of law presents new opportunities and uncharted educational territories for many CLEs. In this session, hear the success stories of several international programming efforts; discover some possibilities for collaborative efforts between CLEs and international law firms; get tips on the practice areas – both traditional and emergent – that are the cresting areas in international CLE curricula today.

Richard Diebold Lee—Richard Diebold Lee Consulting

John H. Morrison—Retired Partner, Kirkland and Ellis

Elizabeth H. Loftus—Leo Cussen Institute

Executive Leadership

Managing Cash and Reserves When Funds Are Tight

The budget process is the guide for determining both short and long-term cash outlay needs. When funds are tight, everyone wants a piece of the pie. The accounting department's function is to train all managers to think like owners, simplify information (KISS) and develop management tools for decision making. You'll learn: Break even analysis, cost benefit analysis, and payback calculations; spotting danger signs—red flags; evaluating overhead costs; looking beyond the numbers—your most valuable asset—employees!

Valerie Merrihew—Illinois Institute for CLE

Tuesday, February 3, 2004

8:30 a.m. – 4:30 p.m.

Registration and Exhibits

8:30 a.m. – 10:00 a.m.

ACLEA Business Meeting and Breakfast

10:00 a.m. – 10:30 a.m.

Networking Break and Exhibits

10:30 a.m. – 12:00 p.m.

Plenary Session

A View from the Chair

Distinguished bar leaders discuss the past, present and future of CLE from the perspective of practitioners actively involved in CLE and the organized bar. A solo practitioner in Dallas, Ms. Whitaker served as chair of the State Bar Board of Directors during 1998-99 and is a past chair of the State Bar CLE Committee. Ms. Askew serves on the Executive Committee of the Board of Directors of the State Bar of Texas and, in June 2003, became Chair of the Board. Both are former chairs of the CLE Committee of the Texas State Bar and are frequent CLE speakers.

Betsy Whitaker—President of the Texas State Bar

Kim J. Askew—Chair of the Board of Directors—Texas State Bar

Marketing

Customer Focus: We Aim to Please (Who?)

Ever wonder why your organization struggles so with putting great ideas into gear? This unique workshop will examine who your customers are (both internal and external) and how to ensure that the systems you have in place for implementing your ideas don't create barriers to making them actually happen. Have you identified your customer base? How do you keep your organization focused on the customer?

Jackie Mell—Akron Bar Association

Thomas E. Dixon, Jr.—State Bar of Wisconsin

Technology

DVD Production

DVD players are at least as common now as VCRs were when we began distributing CLE material on videos. Digital media is compact, easy to ship, and easy to duplicate. This session will ignore the marketing issues and focus on exactly how to put a live presentation onto something that will play in a DVD player. Content includes: Capturing live presentations digitally; Digitizing existing videocassettes; Format alternatives; Software; Procedures; Packaging and duplication; Costs.

Leigh Webber—Practice Management Institute, Inc.

2:30 p.m. – 3:00 p.m.

Networking Break and Exhibits

3:00 p.m. – 4:00 p.m.

WORKSHOPS F

Executive Leadership

Getting the Wheels Turning in Your Organization

Based on Noel Tichy's bestselling *Cycle of Leadership*, a hands-on primer for "hiring, supporting, fostering and promoting leaders who teach." This practical session: Highlights for you the principles and pathways Tichy outlines, invites you to identify potential leaders in your organization, provides the framework for creating an action plan.

Barbara Armstrong—Alaska Bar Association

Dorothy M. Palazzo—Jones Day

Lawrence J. Center—Georgetown University Law Center

Marketing

Focus Groups

CLE professionals are flooded with ideas. Some of them are probably good ideas, but often you can't be sure. Some carry big price tags, so big mistakes are possible unless one can somehow weed out the losers. Focus groups provide a way of evaluating and refining ideas about topics for programs and publications, marketing concepts, formats, venues, and a host of other components of the CLE enterprise. This interactive session will give you a concentrated review of what focus groups can (and cannot) do and how they ought to be done.

Cynthia L. Spanhel—The Nester Group

Programs and In-House

Teaching Legal Research

Typically the first and last time a lawyer learns legal research techniques is in a legal research course taught in law school. Those classes often don't address real-world problems and don't focus on strategies for finding and using resources efficiently. Attorneys often don't realize that the most cost-efficient answers to their legal research questions are available without access to commercial databases. This is where CLE can help, by providing real world legal research tips that help attorneys use billable hours most efficiently. Find out how best to teach practicing lawyers legal research techniques using free and commercial resources.

Jeanne F. Price—Tarlton Law Library, University of Texas Law School

Kumar Percy—Tarlton Law Library, University of Texas Law School

6:30 p.m. – 9:00 p.m.

ACLEA's Closing Event

Taste of San Antonio

See Special Events Schedule for details. Tickets for registrants are included in the registration fee. **Cost per guest is \$50.00.** Please make your reservation in advance on your registration form and be sure to include the number of guests attending.

General Information

Registration

The program registration fee includes conference materials, admission to Sunday, Monday and Tuesday sessions, the business meeting and breakfast, and the Sunday and Tuesday night special events. Optional Saturday Educational sessions, 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 & tour fee payments are nonrefundable after January 14, 2004.

New at This Meeting

If you have a wireless network card for your laptop, be sure to bring it. We will have our own free Wireless Access Point (WAP) set up in the conference common areas, so you can get your e-mail and surf the Web. Our WAP is compatible with 802.11a, b, and g, so whatever you have will work. Wireless cards are available for under \$75. Leigh Webber will be available through his email at lwebber@knowhow.com as well as on-site to assist you with any questions you may have.

While at the conference, view an online demonstration of how streaming video and program materials on your organization's Web site can be used to enhance the value of your offerings and the benefits available through your Web site. Portions of the program will be broadcast through a temporary Web site along with selections from the course materials. Don't miss this cutting-edge opportunity.

Hotel Information

Our host hotel is the Westin Riverwalk Hotel. ACLEA has secured a special room rate of \$185.00, double or single, until **January 7, 2004**. To make your reservations, call (888) 627-8396 and request the Association for Continuing Legal Education group rate. Make your reservations NOW!! If you choose to make reservations outside the group block, such as through an Internet reservation system or with a discount coupon, please be aware that you will be limited to the amenities and the restrictions included in your reservation. Please note: ACLEA has obtained this room rate by contracting a total meeting package with the Westin Riverwalk Hotel. ACLEA must meet certain minimum food & beverage and hotel room pickup requirements or ACLEA will face attrition and/or meeting room rental. In order for ACLEA to continue to provide a reasonable registration fee, we need your help. Please take advantage of the room rate we have negotiated and make your reservation by contacting:

Westin Riverwalk Hotel

420 W. Market Street

San Antonio, TX 78205

Phone (210) 224-6500 / Fax (214) 444-6000

Cancellation Policy

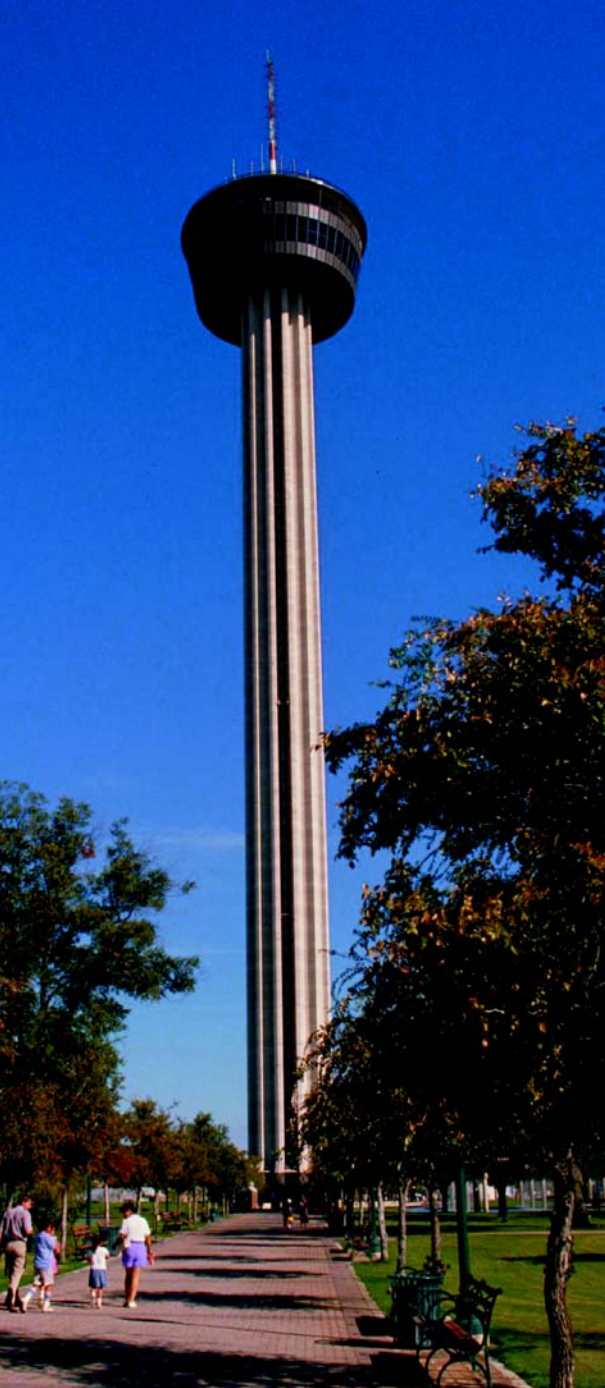
All special event & tour fee payments are nonrefundable after January 14, 2004. Registration Refunds, less a \$50 processing fee, will be given to registrants who cancel by Friday, January 23, 2004. If notice is received between January 24 and 27, 2004 at 5:00 p.m., refunds will be given less a \$150 processing fee. No refunds or transfers will be granted thereafter.

ACLEA

40th Annual Meeting

January 31-February 3,
2004

Westin Riverwalk Hotel
San Antonio, Texas



SAN ANTONIO

San Antonio captures the spirit of Texas. Now the ninth largest city in the United States, the city has retained its sense of history and tradition, while carefully blending in cosmopolitan progress. The city has always been a crossroads and a meeting place. Sounds and flavors of Native Americans, Old Mexico, Germans, the Wild West, African-Americans and the Deep South mingle and merge. Close to eight million visitors a year delight in the discovery of San Antonio's charms.



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