

# ACLEA

## 41st Mid-Year Meeting

January 29 – February 1, 2005

Loews Coronado Bay Resort

San Diego, California

Choose from over 30 sessions  
and 7 educational areas:

In-House            Programs  
Leadership        Marketing  
Publications      Technology  
Professional Development

## ***SAILING TO SUCCESS***

*Presented by  
The Association for  
Continuing Legal Education*



# Why You Should Attend:

## A MESSAGE FROM THE PLANNING COMMITTEE

### “Sailing to Success”... Professionally and Personally...

ACLEA’s 41<sup>st</sup> Mid-Year Meeting at the Loews Coronado Bay Resort in San Diego, California will show you how to set your sails for success in your career and your organization in a four-day “cruise” through keynotes, workshops, and invaluable networking ports-of-call.

Keynoters Dr. Margaret A. Neale of Stanford Business School and Irwin Karp of Capital Organizing Solutions will help us work with our crews with tips on promoting teamwork in our professional work and by running effective and productive meetings. In a special Wednesday keynote, you’ll get valuable insight into contemporary lawyers’ attitudes and challenges from Hon. Carl Horn, author of an acclaimed new ABA book on the subject. The conference closes with a bonus plenary presentation by Jay Foonberg who will share “The Platinum Rule of CLE.”

And plan to take advantage of “shore leave” opportunities in San Diego’s warm and sunny beach-lined paradise with excursions to the ocean, the world-famous zoo, the wild animal park, and in ACLEA’s group tours. See you in San Diego, mate!

Here’s just a preview of topics covered inside—

- *Are you the captain of a dinghy or a schooner? Learn which successful business model is better for your CLE program.*
- *Know when to put a new slant on your pricing strategies.*
- *Don’t Sail in Uncharted Water. Learn the Key Trends in Technology that will Impact CLEs in the Next Five Years.*
- *How do You Get Them to Come on Board? Just in Case or Just in Time. What Motivates Customers to Purchase Publications?*
- *Is Your In-House Training Budget Adrift and Out of Control? Drop Anchor and Find Out What are Best Practices.*
- *Don’t Get Lost in the Dense Fog! Staying Competitive by Understanding Your Market.*
- *Don’t Make Your Customers Navigate by the Stars. Search Engines: How to Select and Configure Them.*
- *Navigating Without a Compass? Cost Accounting for English Majors.*
- *A Tight Ship or a Mutiny? How to Run Effective & Productive Meetings.*
- *Making Your Ship Sea Worthy. ADA Compliance for CLE Organizations: An Update.*
- *Are You Sailing at Half-Mast or Full Sail? Designing that “All Important Brochure.”*
- *Knowing the Ropes. Customer Support for Technology-Based CLE Services.*
- *Want to Sail to New Horizons? Trends – Learn Where In-house Training is Going in the Future.*
- *Chart Your Own Course. You have to Know Where You Are Going to Get There. New Product Launch Strategies.*
- *Between the Devil and the Deep Blue Sea - The Key to Implementing New Technology, Whether You Go It Alone or Hire Consultants.*
- *Drowning in a Sea of Data—The Five Key Reports Every CLE Organization Needs (How do you measure what you’re doing?).*
- *From Stem to Stern – How to Set Up and Manage a Marketing Database for Your House List.*

### Special Thanks to the San Diego Planning Committee

Charles C. Bingaman—Charles C. Bingaman CLE Consulting  
Kathleen Caillouette—Tennessee Bar Association  
Lynn P. Chard—Institute of Continuing Legal Education  
David A. Cruickshank—Paul, Weiss, Rifkind, Wharton & Garrison LLP  
Thomas E. Dixon, Jr.—State Bar of Wisconsin  
Julene Franki—State Bar of Texas  
Scott Harrington—Louisiana State University CLE  
David M. Hominik—Pennsylvania Bar Institute  
Sherie Johnson—King & Ballow Law Offices  
Carole Levitt—Internet for Lawyers  
Dawn M. McKnight—CLE in Colorado, Inc.  
Linda M. Morin-Pasco—Maine State Bar Association  
Francis P. O’Brien—Law Society of Newfoundland  
James J. Parente—Business Professionals’ Network, Inc.  
Barbara Tong—Independent  
Ed West—San Diego County Bar Association  
H. Lalla Shishkevish (Executive Committee Liaison)—District of Columbia Bar  
Donna J. Passons—ACLEA Executive Director  
Linda Cotton (Planning Committee Co-Chair)—Professional Education Systems Institute, LLC  
Pamela J. Jester (Planning Committee Co-Chair)—Continuing Education of the Bar-California

*Cover photo courtesy of the San Diego Convention & Visitors Bureau*

# Special Events Schedule

## Saturday, January 29, 2005

9:30 a.m. – 3:30 p.m.

### Day Trip to Balboa Park and San Diego Zoo

Located in the very heart of California's second largest city is beautiful Balboa Park. Within its 1,074 acres are museums, art galleries, theatres, sports facilities, and the World Famous San Diego Zoo. Your choice of museums to visit include the Reuben H. Fleet Space Theatre and Science Center, Hall of Champions, Museum of Man, Natural History Museum, San Diego Museum of Art, and the Timken Art Gallery.

This is also your chance to visit the world renowned San Diego Zoo, one of the area's most famous attractions. Boasting a huge animal collection and set among 100-acres of sprawling tropical gardens, the Zoo is noted for many rare and exotic species. Most of the Zoo's inhabitants are exhibited in bar-less and moated enclosures that resemble the animal's natural habitat.

Our bus will depart from the Loews Coronado Bay Resort Lobby at 9:30 a.m. The bus will drop off guests at the San Diego Zoo or the center of Balboa Park. With five hours for sightseeing, we hope you can tour the zoo and the other attractions in the area. Cost per person is \$15.00. Please make your required reservations on your registration form. This fee does not include zoo tickets or any entry fees. For information on purchasing tickets to the San Diego Zoo, call 619/231-1515 or go online to [www.sandiegozoo.org](http://www.sandiegozoo.org). For entry fees to museums and attractions at Balboa Park, go online to [www.balboapark.org](http://www.balboapark.org).

4:45 p.m. – 6:30 p.m.

### New Member and Faculty Reception

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



## Sunday, January 30, 2005

6:00 p.m. – 9:00 p.m.

### A Taste of San Diego

At the conclusion of the first day of sessions, join your ACLEA colleagues and friends for an opportunity to network in a casual atmosphere. Our opening event includes a buffet dinner and entertainment. Enjoy the breathtaking evening view of the "lights of San Diego." Tickets for registrants are included in the registration fee. Cost per guest is \$30. Please make your required advance reservations on your registration form.

## Monday, January 31, 2005

4:00 p.m. – 8:00 p.m.

### Networking Excursion to Historic Gaslamp Quarter and Seaport Village

Explore and dine in two popular historic waterfront areas of San Diego. The Gaslamp Quarter features 16 blocks of sophisticated nightlife and charm. There are many restaurants, clubs and entertainment, along with the Horton Plaza for shopping.

Take a leisurely walk and escape the madness of the city for a while at Seaport Village (10 minutes from the Gaslamp Quarter). Stroll down cobblestone paths taking in the greenery, ponds and fountains as you make your way around 75 specialty shops, 13 eateries and four full-service restaurants. Unsurpassed views of the bay, its ships and the San Diego-Coronado Bridge surround the area. Complete your visit with a ride on a carousel dating from the 1890s. Enjoy the waterfront for its CLEAN AIR and the fresh ocean breeze. The shops are always interesting and fun to visit, with plenty of selections of good food!

Depart from the Loews Coronado lobby promptly at 4:00 p.m. Cost per person is \$10. Please make required reservations on your registration form.

7:30 p.m. – 11:30 p.m. (If you can stand it that long!)

### Karaoke in Cays Lounge

When you return from the ACLEA networking excursion or your other alternate afternoon activity, come to Cays Lounge in the lobby of the Loews Coronado Bay Resort. "Show-off" your own abilities or enjoy watching your colleagues and friends in a repeat of the Clearwater Karaoke performances. A cash bar will be available.

## Tuesday, February 1, 2005

6:30 p.m. – 10:00 p.m.

### ACLEA's Closing Event

ACLEA's closing event is a "must see." The evening begins with networking over cocktails followed by a seated dinner. We will be entertained throughout the evening by the Tostado Sisters. Their show features music from the 1940's through today and includes dancing, interactive games and prizes. The more you participate, the more you win! The Tostado Sisters have been entertaining people from all over the world with their interactive show for almost a decade. This Dynamic Duo has a unique style and approach as they captivate the crowd with their contagious energy. Become uninhibited and have the greatest time ever!

## Saturday, January 29, 2005

- 8:15 a.m. – 4:15 p.m.  
CLE Boot Camp
- 9:30 a.m. – 3:30 p.m.  
Day Trip to Balboa Park and San Diego Zoo (ticketed event)
- 4:15 p.m. – 5:30 p.m.  
Washington D.C. Planning Committee Meeting
- 4:30 p.m. – 6:30 p.m.  
New Member and Faculty Reception

## Sunday, January 30, 2005

- 8:00 a.m. – 5:00 p.m.  
Registration and Exhibits
- 8:00 a.m. – 9:30 a.m.  
Selected SIG Meetings (Marketing, Publications, State/Provincial Bar)
- 9:30 a.m. – 10:00 a.m.  
Networking Break and Exhibits
- 10:00 a.m. – 10:30 a.m.  
President's Welcome
- 10:30 a.m. – 12:00 noon  
Plenary Session: Forming, Storming and Performing: Some of the Secrets of High Performance Teams
- 12:00 noon – 1:30 p.m.  
SIG and Committee Chair Luncheon (ticketed event-by invitation only)  
First Time Attendee Luncheon (ticketed event-by invitation only)
- 1:45 p.m. – 2:45 p.m.

### **WORKSHOPS A**

#### **Executive Leadership**

What are Successful Business Models in CLE? Being Entrepreneurial in a Big Bureaucracy or On Your Own

#### **Marketing and Programs**

Pricing Strategies—Does One Size Fit All?

#### **Technology**

Key Trends in Technology that Impact CLE

#### **Publications**

What Motivates Customers to Purchase Publications: You'll Be Surprised at the Answers

#### **In-House**

Best Practices in Budgeting In-House Training

- 2:45 p.m. – 3:30 p.m.  
Exhibit Hall Showcase

- 3:30 p.m. – 4:30 p.m.

### **WORKSHOPS B**

#### **Executive Leadership, Programs, Publications, and Marketing**

Staying Competitive in a Changing CLE Marketplace

#### **In-House, Marketing, and Programs**

Sailing to Success Using Turn-key CLE: Selecting and Marketing with Professional CLE Speakers

#### **Technology**

How to add Value to Your Online CLE Services Using Search Engines

#### **Publications**

Cost Accounting for English Majors

- 4:30 p.m. – 5:30 p.m.  
Committee Meetings (International, Mandatory CLE)
- 6:00 p.m. – 9:00 p.m.  
A Taste of San Diego

# Monday, January 31, 2005

8:00 a.m. – 3:00 p.m.

Registration and Exhibits

8:00 a.m. – 9:00 a.m.

Committee Meetings (Exhibitors & Sponsors, Public Interest)  
ORACLE/ACLEA Joint Session – Ethics & Professionalism:  
Rules and Definitions

9:00 a.m. – 10:30 a.m.

Plenary Session: How to Run Effective & Productive Meetings

10:30 a.m. – 11:00 a.m.

Networking Break and Exhibits

11:00 a.m. – 12:00 noon

## WORKSHOPS C

**Executive Leadership, Programs, and Publications**

Understanding the Economics of the CLE Industry

**Marketing, Programs, and Publications**

Cross-Marketing, Break-Time Marketing and Up-Selling

**Publications and Technology**

XML for Online and Print Publishing

**Executive Leadership, Programs, and Technology**

ADA Compliance for CLE Organizations

**In-House**

Getting and Keeping Your Audiences for In-House CLE Programs

12:00 noon – 1:30 p.m.

SIG Lunches (ticketed event)

(Executive Leadership, Marketing, Publications,  
Technology)

1:45 p.m. – 2:45 p.m.

## WORKSHOPS D

**Executive Leadership, Programs, and Publications**

Creating and Maintaining a Customer-Oriented Ship for  
Your Passengers (Customers) and Crew (Employees)

**Marketing, Programs, and Publications**

The “All-Important” Brochure

**Technology**

Smooth Sailing: Effective Customer Support for  
Technology-based Seminars, Publications, and Services

**Marketing and Publications**

Models for Online Publications

**In-House**

The Future of In-House Training

2:45 p.m.

Free Time

4:00 p.m. – 8:00 p.m.

Networking Excursion to Historic Gaslamp Quarter and  
Seaport Village (ticketed event)

7:30 p.m. – 11:30 p.m.

Karaoke in Cays Lounge

*Welcome to San Diego*

## OPTIONAL EVENTS

Saturday, January 29, 2005

9:30 a.m. – 3:30 p.m.

Day Trip to Balboa Park and San Diego Zoo

Monday, January 31, 2005

4:00 p.m. – 8:00 p.m.

Networking Excursion to Historic Gaslamp Quarter & Seaport Village

# Tuesday, February 1, 2005

8:00 a.m. – 5:00 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 noon

Plenary Session: “Get a Life! In Search of Balance and  
Fulfillment in the Contemporary Practice of Law”

12:00 noon – 1:20 p.m.

SIG Lunches (ticketed event)

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

1:30 p.m. – 2:30 p.m.

## WORKSHOPS E

**Executive Leadership, and Programs**

Fundraising and Sponsorships in CLE

**Marketing, Programs, and Publications**

New Product Launch Strategies

**Executive Leadership and Technology**

Implementing New Technology, Whether You Go It  
Alone or Hire Consultants, It’s All About Managing  
People and Projects (Two Sessions)

Session One: Project Management for Technology-  
related Projects

**All Tracks**

Books, Books, Books and the Men and Women Who  
Love Them—Chapter 3!

**In-House**

What Law Firms Want from CLE Courses

2:30 p.m. – 3:00 p.m.

Networking Break and Exhibits

3:00 p.m. – 4:00 p.m.

## WORKSHOPS F

**Executive Leadership, Programs, and Publications**

Drowning in Data—The Five Key Reports Every CLE  
Organization Needs

**Marketing, Programs, and Technology**

How to Set Up and Manage a Marketing Database for  
Your House List

**Executive Leadership, and Technology**

Session Two: Helping Your Staff Handle Change—  
People, Not Hardware and Software, are the Real  
Challenge

**Publications**

Hot Topics by the Pool

**All Tracks**

30 Technology Tips in 60 Minutes – Useful and  
Entertaining Technology For CLE Providers

4:00 p.m. – 5:00 p.m.

Closing Plenary Session: What Lawyers Want and Need  
from CLE: How Smart CLE Organizations Can Provide It.  
Learn the “Platinum Rule of CLE”

6:30 p.m. – 10:00 p.m.

ACLEA Closing Event

# Saturday, January 29, 2005

## *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:** Alan Treleaven — Law Society of British Columbia

**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 Myers — 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.

Jeffrey H.A. Johnson — 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 website 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 N. Shearon — Tennessee Commission on CLE and Specialization

**2:45 p.m. Finances and Negotiation Techniques** – Does one impact the other? You bet! This presentation will focus on budgeting, expense monitoring, financial ratios, forms, check lists and insight on how to save money (this is where your negotiation skills are so important!) at your seminars and conferences.

Donna J. Passons — Texas Institute of CLE

**3:45 p.m. Panel of Experts**

**4:15 p.m. Adjourn**

**9:30 a.m.– 3:30 p.m.**

**Day Trip to Balboa Park and San Diego Zoo (ticketed event)**

See Special Events Schedule for details. Depart from the Loews Coronado Lobby at 9:30 a.m. for this day trip. **Cost per person \$15.00.** Please make your required reservations on your registration form.

**4:15 p.m. - 5:30 p.m.**

**Washington D.C. Planning Committee Meeting**

**4:30 p.m. - 6:30 p.m.**

**New Member and Faculty Reception**

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

# Sunday, January 30, 2005

**8:00 a.m. – 5:00 p.m.**

**Registration and Exhibits**

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**Selected SIG Meetings**

(Marketing, Publications, and State/Provincial Bar)

**9:30 a.m. – 10:00 a.m.**

**Networking Break and Exhibits**

**10:00 a.m. – 10:30 a.m.**

**President’s Welcome**

Mary Lynne Johnson, ACLEA President

**10:30 a.m. – 12:00 noon**

**Plenary Session**

**Forming, Storming and Performing: Some of the Secrets of High Performance Teams**

When managed well, teams stimulate creativity and innovation, make an organization more adaptive to market forces, and ultimately tap into the organization’s deep intellectual resources, ensuring that the organization thrives. When managed poorly, teams can be disastrous, time consuming monsters. In this talk, we will explore some of the secrets to creating high performance teams and some of the pitfalls you REALLY want to avoid. Professor Margaret Neale is the John G. McCoy-Banc One Corporation Professor of Organizations and Dispute Resolution. Prior to joining Stanford’s faculty in 1995, she was the J.L. and Helen Kellogg Distinguished Professor of Dispute Resolution and Organizations at the J.L. Kellogg Graduate School of Management at Northwestern University. She began her academic career as a member of the faculty at the Eller School of Management of the University of Arizona.

Professor Margaret A. Neale —Stanford University

**12:00 noon – 1:30 p.m.**

**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.

**First-Time Attendee Luncheon (ticketed event)**

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

1:45 p.m. – 2:45 p.m.

## WORKSHOPS A

### *Executive Leadership*

#### **What are Successful Business Models in CLE? Being Entrepreneurial in a Big Bureaucracy or On Your Own**

Seeing more competition on the horizon? This session will discuss the elements of a successful business plan and apply these elements to the non-profit world in which most CLE's operate. Speakers will address competitive issues for both programs and publications.

Terry Burnet—South Carolina Bar - CLE Division

Maryanne G. Jensen—Massachusetts CLE, Inc.

### *Marketing and Programs*

#### **Pricing Strategies—Does One Size Fit All?**

Pricing is a controversial subject for many CLE providers. How do you determine the price for a product or seminar? Are there “rules” to follow when “setting the price”? How do you test “price”? Do you test “price” differently via email versus direct mail? How do you analyze your “price test” results? Are there really “price-points”? Presenter, Chris d'Eon, has over 13 years of marketing experience with Internet, Radio, TV, Direct Mail and Print Advertising.

Chris d'Eon—Founder, Deon Direct and Past President of the San Diego Direct Marketing Association

### *Technology*

#### **Key Trends in Technology that Impact CLE**

How will decreased technology costs, increased standardization of software and document formats, and increased use of broadband impact continuing legal education over the next five years? Attend this session to learn about the open software movement and its impact on costs, inter-operability and security. Find out how web and software “standards” will decrease costs and allow you to re-purpose content. Hear about future trends in wireless technology, multimedia and interactive seminars, distance learning, content portals, electronic libraries, specialized law-related search engines, and compliance tracking for CLE providers and bar associations.

Timothy Stanley—Justia

### *Publications*

#### **What Motivates Customers to Purchase Publications: You'll Be Surprised at the Answers**

Ever really ask yourself why people buy legal publications? How sure are you that what you spend the most money and time on are features customers want? Could you sell more by investing less in the “traditional content” we've included in books for years? Does being “first-to-market” really matter? Discover the answers through somewhat startling examples of success stories and “not-so-success” stories.

James Edwin Jackson II—LexisNexis

### *In-House*

#### **Best Practices in Budgeting In-House Training**

Whether you are working on a shoestring budget or working with ample resources, the firm's partners want to know that their investment in CLE and training is carefully planned and managed. You'll learn to make the case for internal courses, inbound consultants and external CLE courses. Then examine the planning of an evolving curriculum over a year or more. You'll also look at ways to evaluate expenses and save money - even when no one expected it.

Stewart Whittingham—Davies Ward Phillips & Vineberg LLP

2:45 p.m. – 3:30 p.m.

## Exhibit Hall Showcase

Come to the exhibit hall during this time and become eligible for the drawing to receive a free registration for ACLEA's 41st Annual Meeting in Washington, D.C. 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.

3:30 p.m. – 4:30 p.m.

## WORKSHOPS B

### *Executive Leadership, Programs, Publications, and Marketing*

#### **Staying Competitive in a Changing CLE Marketplace**

Let's face it, competition is a major factor in today's CLE environment and staying competitive now means more than just keeping in touch with customers by way of printed mail. Being competitive means understanding the dynamics of an organization, tailoring marketing efforts to demographics, and keeping a watchful eye on the competition. This session will explore some of the do's and don'ts that you will want to consider if you are to stay competitive in the face of the changing CLE environment. In this interactive session, Rob Koonce will share some of his experiences as a small business owner and as a director of CLE for a state bar organization. At the conclusion of this session, attendees will hopefully leave with a better understanding of some factors that will lead to improved decision-making.

Rob Koonce—State Bar of New Mexico

### *In-House, Marketing, and Programs*

#### **Sailing to Success Using Turn-key CLE: Selecting and Marketing with Professional CLE Speakers**

From port to starboard, learn the ropes from CLE Directors and Professional Speakers who have sailed to success with turn-key CLE. Learn what motivates several CLE Directors to use a Professional CLE speaker over a volunteer and how to make headway in finding just the right Professional. Discover if they market the Professional any differently than a volunteer. Finally, do the revenues justify the expense of hiring a Professional speaker?

Carole Levitt (Moderator) —Internet for Lawyers

Barbara Armstrong—Alaska Bar Association

Susan Blair—Nashville Bar Association

Kenneth Broda-Bahm—Persuasion Strategies

Roy Ginsburg—Roy Ginsburg Consultant

Mary Lynne Johnson—Atlanta Bar Association

### *Technology*

#### **How to add Value to Your Online CLE Services Using Search Engines**

Learn how you can use full-text search engines and databases to effectively search and display results from your CLE course and product catalogs as well as your electronic CLE and book content. Tim will explain the pros and cons of databases versus full-text search engines, as well as Google's free Public Service Search program. He will also compare the major databases—Oracle, Microsoft SQL Server and MySQL—as search tools. Tim will discuss multimedia search engines and search engine optimization and he'll conclude with search engine recommendations for different budgets and operating systems.

Timothy Stanley—Justia

### *Publications*

#### **Cost Accounting for English Majors**

Want to be more finance “savvy”? This program will show you how cost accounting and reporting techniques that synthesize technical ‘book keeping’ facts can be turned into valuable management information. The emphasis of the presentation will be on transforming and communicating these elements in a manner that is quickly and easily understood by all members of a management team. Items to be covered will include data sources, handling of direct and indirect costs, overhead absorption, report preparation, pricing decisions and communication methods for various audiences.

Frances Donovan—Continuing Education of the Bar-California

John Ruppel—Bradford Publishing Company

4:30 p.m. – 5:30 p.m.

## Committee Meetings

(International, Mandatory CLE)

6:00 p.m. – 9:00 p.m.

### **A Taste of San Diego**

At the conclusion of the first day of sessions, join your ACLEA colleagues and friends for an opportunity to network in a casual atmosphere. Our opening event includes a buffet dinner and entertainment. Enjoy the breathtaking evening view of the “lights of San Diego.” Tickets for registrants are included in the registration fee. Cost per guest is \$30. Please make your required advance reservations on your registration form.

## **Monday, January 31, 2005**

8:00 a.m. – 3:00 p.m.

### **Registration and Exhibits**

8:00 a.m. – 9:00 a.m.

### **Committee Meetings**

(Exhibitors & Sponsors, Public Interest)

8:00 a.m. – 9:00 a.m.

### **ORACLE/ACLEA Joint Session**

#### **“Ethics & Professionalism: Rules and Definitions”**

Ethics. Professionalism. Professional Responsibility. The same thing – or different? Depends on the varying definitions and rules. This panel looks at the confusion surrounding accreditation of these topics and possible ways to clarify the process.

Barbara Armstrong (Moderator)—Alaska Bar Association

Jill Castleman, ACLEA Representative—Georgetown University Law Center

Diane Chesley-Lahm, ORACLE Representative—Ohio Commission on Continuing Legal Education

Professor Linda Sorenson Ewald—Chair, Kentucky Bar Association Ethics Committee

9:00 a.m. – 10:30 a.m.

### **Plenary Session**

#### **How to Run Effective & Productive Meetings**

Meetings don't have to be a painful experience. Never again have your participants thinking, “we can't go on meeting like this.” Learn how to keep meetings interesting, keep them on track and make sure that things get done. We will cover the basic skills of running effective meetings: defining meeting purpose, developing the agenda, staying on time, keeping discussions on track, making decisions, closing the meeting and ensuring follow-up with action items. We'll also go beyond the basics to cover the art of productive meetings: facilitation skills, questions to stimulate discussion, active listening, ways to end discussions, dealing with difficult people and spicing up meetings to make them fun. After this program, people will leave meetings that you run saying, “that was a good meeting.” Irwin Karp is an Organizing & Productivity Consultant in Sacramento, California. He is a lawyer by training and was the managing partner of a small environmental law firm for nearly 20 years. Six years ago, Mr. Karp founded Capital Organizing Solutions to help busy people get things done. He is a member of the National Association of Professional Organizers and the Institute of Management Consultants, and serves as a special advisor to the Executive Committee of the Law Practice Management & Technology Section of the State Bar of California.

Irwin Karp—Capital Organizing Solutions

10:30 a.m. – 11:00 a.m.

### **Networking Break and Exhibits**

11:00 a.m. – 12:00 noon

### **WORKSHOPS C**

#### **Executive Leadership, Programs, and Publications**

##### **Understanding the Economics of the CLE Industry**

The economics of programs and publications are different in many respects. This session will address questions that confront both sides of a CLE business: hiring vs. contracting — do the costs outweigh benefits? How do we establish a business relationship with volunteer contributors? How do we assess economic viability of existing products? And, how do we assess the potential of new ideas?

Frances Donovan—Continuing Education of the Bar-California

Sandra R. Geller—Practicing Law Institute

Jan F. Majewski—Stetson University College of Law

#### **Marketing, Programs, and Publications**

##### **Cross-Marketing, Break-Time Marketing and Up-Selling**

We all know it's easier to keep established customers than to lure new ones. It's also easier to sell more to established customers, who arguably already are familiar with the quality of your products and services. Hear our ways for reaching out to this “prime audience” to inform and entertain. In the process, you can not only increase sales and registrations, but you distinguish your brand and the customer's entire experience. Come get inspired!

Eliza Reyes Gillespie—State Bar of Wisconsin

Anita K. Hamlett—Alabama Bar Institute for CLE

David Kroll—State Bar of Texas

#### **Publications and Technology**

##### **XML for Online and Print Publishing**

A CLE's ability to publish its content in both print and online formats holds the promise of increased distribution and new revenue streams. However, going online with traditional publishing methods often requires twice the effort of what was required to produce print alone. This presentation illustrates how XML and Word 2003 can be used to vastly reduce the ongoing costs of simultaneously producing print and online content. Recent exciting work at CLE of British Columbia will be featured.

Steven Fitzgerald—Habañero Consulting Group

Caterina Sanders—Habañero Consulting Group

#### **Executive Leadership, Programs, and Technology**

##### **ADA Compliance for CLE Organizations**

From sign language interpreters to modified testing procedures: how far do CLE providers have to go to “reasonably accommodate” disabled individuals? Do you have ADA liability if you offer courses on-line? Does it matter whether the CLE provider is a profit or non-profit organization? Does it matter whether a fee is charged? What if the services are provided to members only and not to the general public? This workshop will acquaint you with your legal obligations as a CLE provider under the Americans with Disabilities Act. The focus will be on practical application of the law, with many examples of forms of accommodation used by other CLE providers to avoid ADA liability. Steer clear of rough waters with this timely information!

Lynn Siegel—King & Ballow Law Offices

#### **In-House**

##### **Getting and Keeping Your Audiences for In-House CLE Programs**

Hear practical tips on how to get and keep audiences for in-house CLE programs when food and the promise of CLE credit (even specialty credit) are not enough. Topics will include how to effectively market programs to internal audiences through brochures, emails, notices, word-of-mouth, and other options; factors to consider when designing programs such as length, delivery approach (e.g., live, audio, video), and timing (day of week and time of day); and techniques for increasing interest in and engagement of participants during programs.

Sari Fried-Fiori—Holland & Knight, LLP

12:00 noon – 1:30 p.m.

## **SIG Luncheons (ticketed event)**

**Executive Leadership**—Succession Planning: Going In or Going Out. Was there a plan prepared for you when you stepped into your leadership role? Are you engaged in planning for your successor or, at least, for the transition? Our roundtable discussion will explore the challenges involved in crafting a model succession plan from multiple perspectives (e.g., outgoing and incoming leaders, internal staff, boards or special committees) and consider such issues as scope, timing and makeup of the planning team. Moderated by Richard E. Carter—ALI-ABA and Elaine Ohlson—Testa, Hurwitz & Thibault, LLP

**Marketing**—“Sailing to Success: Marketing Strategies that Work” Join your fellow marketeers for a roundtable discussion to discuss our winning CLE marketing strategies. We’ll talk about who’s done what, what’s worked, what hasn’t. In the end, we’ll see how we can put each others successful strategies to work ourselves. Also, we will begin discussing our contribution to the developing ACLEA branding campaign. Moderated by Marketing SIG co-chairs Anita K. Hamlett—Alabama Bar Institute for CLE and Mark Rosch—Internet for Lawyers

**Publications**—Join us for discussions of topics of interest. Each table will give a short report at the conclusion of the meeting. Moderated by Terry Burnett—South Carolina Bar - CLE Division and Judith Knight—State Bar of Wisconsin

**Technology**—Join us for another productive roundtable discussion! We plan to cover new technologies, new technical product lines, and new ways to make our jobs easier. We will also “get to know” each other’s responsibilities and work methods as well as share tips and tricks that are only learned through experience. The last luncheon was fascinating and productive, you won’t want to miss the new ideas that come from this one! Moderated by Ginger Shepard—Illinois Institute for CLE and Scott Harrington—Louisiana State University CLE

1:45 p.m. – 2:45 p.m.

## **WORKSHOPS D**

### ***Executive Leadership, Programs, and Publications***

#### **Creating and Maintaining a Customer-Oriented Ship for Your Passengers (Customers) and Crew (Employees)**

How do you keep your organization focused on the customer? How do CLE providers know if the people who buy their products and attend their seminars are satisfied? How do you create an internal and external environment in your organization that assures a customer focus? Why is a loyal customer better than a satisfied customer and how to turn a satisfied customer into loyal one?

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

Roy Ginsburg—Roy Ginsburg Consultant

### ***Marketing, Programs, and Publications***

#### **The “All-Important” Brochure**

How to construct CLE brochures that get response, including designing the covers, the titles, the importance of sub-titles and sub-heads, the artwork, layout, product/service benefits, guarantees, faculty biographies and pictures, pricing, cross-sells, order forms, and all other elements that determine a brochure’s effectiveness.

Charles C. Bingaman—Charles C. Bingaman Consulting

## ***Technology***

### **Smooth Sailing: Effective Customer Support for Technology-based Seminars, Publications, and Services**

Now that you’ve made the move to provide electronic versions of your products, the next step is to offer first-rate customer support, despite budget and staff restraints. Learn how to: Provide quality support with limited resources; Manage call volume, response time, and customer expectations; Document customer contacts and develop meaningful statistics; and Draw the line between supporting your own products and solving a customer’s unrelated technical issues; Communicate problems back to developers and production staff; Design effective support web pages, tutorials, and FAQs. Other topics include making the most of cross-selling opportunities, setting support policies and procedures for effective service, a discussion of outsourcing vs. in-house technical support, and ways to develop your technical staff. We’ll help you add real value to your tech-based services with effective customer support.

Amy Danziger Shapiro—ALI-ABA

Cheryl Moore—Continuing Education of the Bar-California

## ***Marketing and Publications***

### **Models for Online Publications**

Are your publications available online? Are you thinking about making them available online? Don’t miss this opportunity to discuss various models for online publishing. The presenters will discuss reasons to put publications online, different methods of doing so, the relationship to print publications, and pricing strategies. This will be an interactive session, so come prepared to ask questions and contribute your own thoughts and experience.

Nora Crandall—Illinois Institute for CLE

Thomas M. Strassburg—Virginia CLE

## ***In-House***

### **The Future of In-House Training**

This program will look at the evolution of lawyer training programs over the next decade. The ABA and other organizations have studied the skills needed by lawyers to be successful. The necessary skills are changing as the legal profession has lost its historic “monopoly”, as competition for clients has increased and as clients of lawyers have become increasingly sophisticated. This program will address how training needs to respond to these trends and changing lawyer needs.

Susan Raridon Lambreth—Hildebrand International

2:45 p.m.

## **Free Time**

4:00 p.m. – 8:00 p.m.

### **Networking Excursion to Historic Gaslamp Quarter and Seaport Village (ticketed event)**

See Special Events Schedule for details. Cost per person \$10.00. Depart from the Loews Coronado Lobby promptly at 4:30 p.m. Please make your required reservations on your registration form.

7:30 p.m. – 11:30 p.m. (If you can stand it that long!)

## **Karaoke in Cays Lounge**

When you return from the ACLEA networking excursion or your other alternate afternoon activity, come to Cays Lounge in the lobby of the Loews Coronado Bay Resort. “Show-off” your own abilities or enjoy watching your colleagues and friends in a repeat of the Clearwater Karaoke performances. A cash bar will be available.

### **ACLEA WEBSITE**

Did you know that you can  
renew your membership dues online?

Check out this new member benefit and other features of  
ACLEA’s website at [www.aclea.org](http://www.aclea.org).

8:00 a.m. – 5:00 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 noon

## Plenary Session

### “Get a Life! In Search of Balance and Fulfillment in the Contemporary Practice of Law”

Judge Horn will review recent polls, surveys, and studies relevant to the contemporary practice of law. Although troubling trends will be conceded and addressed, at the core of this nationally acclaimed presentation is a positive and hopeful message. The first to propose “twelve steps toward fulfillment in the practice of law” for the individual practitioner, Judge Horn also has a number of practical suggestions for law schools, firms and bar organizations. Judge Carl Horn, III’s varied legal career has included private practice, employment in the non-profit sector, and for the past eighteen years, public service as Chief Assistant U.S. Attorney and U.S. Magistrate Judge. He is the author of numerous articles and several books.

Judge Carl Horn, III—U.S. Magistrate Judge

12:00 noon – 1:20 p.m.

## SIG Lunches (ticketed event)

**Local & Specialty Bars**—Roundtable discussion. Moderated by Jacqueline M. Mell—Akron Bar Association

**Nationals**—Meet others that are producing national CLE and share your experiences and observations. From developments in technology to programming trends and MCLE, the National providers face many unique challenges. Visit the ACLEA website (National SIG) and find out more about the past discussions. Discussion topics are welcomed. Moderated by Mark T. Carroll—ALI-ABA and Peter A. Glowacki—American Bar Association - Center for CLE

**In-House**—Recent Developments in In-House Programs and The Growth of Job Opportunities in In-House. Moderated by David A. Cruickshank—Paul, Weiss, Rifkind, Wharton & Garrison LLP

**State & Provincial Bars**—Join us for roundtable discussions of techniques that have worked best for your group at each of the luncheon tables. These ideas will then be shared with the entire group. Moderated by Thomas E. Dixon, Jr.—State Bar of Wisconsin and Rob Koonce—State Bar of New Mexico

**Law Schools**—Discussion of the current issues facing law school CLE departments. Moderated by Elizabeth M. Stephens—OLI, Lewis & Clark Law School

1:30 p.m. – 2:30 p.m.

## WORKSHOPS E

### *Executive Leadership, and Programs*

#### **Fundraising and Sponsorships in CLE**

Sponsorships have become an important tool for nonprofits to raise funds and fit well with the increasing trend among corporations to seek out philanthropic alignments that enhance their corporate image and visibility. What are the risks and benefits of seeking sponsorships? Who are likely sponsors of CLE activities?

James J. Parente—Business Professionals’ Network Inc.

### *Marketing, Programs, and Publications*

#### **New Product Launch Strategies**

Most new CLE products and seminars don’t just sell themselves – even if they are “the next big thing” – so, what should your launch strategy include to help ensure success? How can you not only get the word out – but the orders rolling in? How and when do you budget for new product rollouts? Do seminars, publications or web-based products require different approaches? What about groups of products or product in series? We will be discussing these and other launch strategy questions and will provide examples of successful and not-so-successful attempts.

Jennifer L. Ellis—Pennsylvania Bar Institute

Frank V. Harris—Minnesota CLE

### *Executive Leadership and Technology*

#### **Implementing New Technology, Whether You Go It Alone or Hire Consultants, It’s All About Managing People and Projects (Two Sessions)**

##### **Session One: Project Management for Technology-related Projects**

Have you been assigned to manage a tech project—but hesitate because you are not a tech guru? Want to learn the project management skills that pay off for all projects—and especially tech-related projects? Spend one hour and we’ll show you how to keep your project on time, on budget, and on track, even if you don’t speak tech-nize.

Karen Brown—Institute of Continuing Legal Education

Yvette Snavely—Institute of Continuing Legal Education

### *All Tracks*

#### **Books, Books, Books and the Men and Women Who Love Them**

Join a panel of ACLEA members for an informal discussion about their latest business and nonbusiness reading suggestions and experiences. What’s nourishing your soul lately? What’s on your bedside table? Come and share your reading latest reading adventures and discover who’s reading what these days!

Barbara Armstrong—Alaska Bar Association

Charles C. Bingaman—Charles C. Bingaman Consulting

### *In-House*

#### **What Law Firms Want from CLE Courses**

Customers want more in modern CLE programming. And sometimes less. What formats, what length, what materials and what “add-ons” do law firms want? In a world of expanding CLE options, you’ll see what inspires a firm to choose some courses over others—or gets them to come back to the same course every year.

David A. Cruickshank—Paul, Weiss, Rifkind, Wharton & Garrison LLP

2:30 p.m. – 3:00 p.m.

## Networking Break and Exhibits

3:00 p.m. – 4:00 p.m.

## WORKSHOPS F

### *Executive Leadership, Programs, and Publications*

#### **Drowning in Data—The Five Key Reports Every CLE Organization Needs (How do you measure what you’re doing?)**

A discussion of the important reports that managers should use to make sound decisions and to avoid being swamped by the minutiae.

Julene Franki—State Bar of Texas

### *Marketing, Programs, and Technology*

#### **How to Set Up and Manage a Marketing Database for Your House List**

No matter what the size of your CLE organization or staff, the world of CLE relies almost exclusively on direct mail to promote our products and services. It is imperative that we understand the value of our “house” mailing list database and know how to create and maintain a “house list” database that we can use to reach our customers. Are there rules to follow on how long you keep a name on your “active house list”? What can we do to ensure we’re creating a database that works for our direct-mail promotions?

Randy Gerson—President, San Diego Direct Marketing Association

## Executive Leadership and Technology

### Session Two: Helping Your Staff Handle Change—People, Not Hardware and Software, are the Real Challenge

You've installed your new system and the tech consultant has left. Your director is happily waiting for the productivity gains promised—and looking to you to lead the way. Learn to successfully engage staff in learning new systems, process changes, work group relationships, communication channels—the ongoing “people-related” changes that make or break productivity gains.

Karen Brown—Institute of Continuing Legal Education

Yvette Snaveley—Institute of Continuing Legal Education

## Publications

### Hot Topics by the Pool

Close out the Publications track in style and around the pool. These informal discussions are typically some of the most valuable sessions we have, and this setting will allow us to air things out. Bring your hot topics, your vexing problems, your questions, and your successes to share with your colleagues as our agenda finds us around the pool.

Kent R. Hopper (Moderator)—The Missouri Bar

## All Tracks

### 30 Technology Tips in 60 Minutes – Useful and Entertaining Technology For CLE Providers

Spend 60 minutes of your time and learn about 30 different items, from Internet research sites to PDAs to easy ways to find music and video clips for your seminars. During this session the speaker will explore useful Web sites, explain search engines, exhibit some uses for peer-2-peer file trading and discuss various pieces of technology that can help you in your work.

Jennifer L. Ellis—Pennsylvania Bar Institute

4:00 p.m. – 5:00 p.m.

### Closing Plenary Session

#### What Lawyers Want and Need from CLE: How Smart CLE Organizations Can Provide It. Learn the “Platinum Rule of CLE”

Being a lawyer is demanding. Lawyers must know the law, attract and retain clients and manage the economics of the practice. Many lawyers look to CLE for assistance, but many do not. CLE is challenged to provide programs, publications and other resources which will help lawyers to practice effectively. To do this, CLE must really understand the requirements, demands and stresses of practicing lawyers. Why do some lawyers readily turn to CLE for help while others are reluctant? Why do some lawyers feel they are too busy to learn new skills? This presentation will consider how CLE can meet the needs of lawyers, by understanding how lawyers look at CLE and by considering the factors lawyers consider when deciding if a CLE presentation is relevant and important to them. Mr. Jay Foonberg, a lawyer, best-selling legal author and experienced CLE presenter will discuss how to build those crucial links between lawyers and CLE providers by understanding what lawyers actually do, what motivates them, what is important to them and how to reach them.

Jay Foonberg—Bailey & Partners

6:30 p.m. – 10:00 p.m.

### ACLEA Closing Event

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 and tour fee payments are nonrefundable after January 14, 2005.

**Spouse/Guest Fee** — ACLEA has instituted a spouse/guest fee for attendance at ACLEA meetings. Any spouse/guest who is interested in networking with other spouse/guests as well as friends in ACLEA, may pay a fee to cover the costs of food and beverage and attendance at some meetings. This \$95 fee includes the welcome reception, the continental breakfasts, the business meeting breakfast, the exhibit hall mixer, morning and afternoon breaks, and attendance at any sessions on topics that may be of interest. This benefit is extended only to those spouse/guests who are not eligible for ACLEA membership. **ANYONE CONSULTING WITH OR AFFILIATED WITH AN ORGANIZATION ELIGIBLE FOR MEMBERSHIP IN ACLEA IS NOT ELIGIBLE FOR THIS FEE.**

## Hotel Information

Our host hotel is the Loews Coronado Bay Resort. ACLEA has secured a special room rate of \$179.00, double or single, until December 31, 2004. To make your reservations, call (800) 815-6397 or (619) 424-4000 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 at the Loews Coronado Bay Resort. 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:**

**Loews Coronado Bay Resort**

**4000 Coronado Bay Road**

**Coronado, California 92118**

**Phone (619) 424-4000 / Fax (619) 424-4400**

## Cancellation Policy

All special event & tour fee payments are nonrefundable after January 14, 2005. Registration Refunds, less a \$50 processing fee, will be given to registrants who cancel by Friday, January 14, 2005. If notice is received between January 15 and 21, 2005 at 5:00 p.m., refunds will be given less a \$150 processing fee. No refunds or transfers will be granted thereafter.

### Questions?

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

### Register By:



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



**Fax: (512) 451-2911**



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

# ACLEA

## 41st Mid-Year Meeting

January 29-February 1, 2005  
Loews Coronado Bay Resort  
San Diego, California



## San Diego

San Diego is California's second largest city. Blue skies keep watch on 70 miles of beaches and a gentle Mediterranean climate begs for a day of everything and nothing. Bordered by Mexico, the Pacific Ocean, the Anza-Borrego Desert and the Laguna Mountains, San Diego county's 4,200 square miles offer immense options for business and pleasure. In downtown San Diego and the electric Gaslamp Quarter, you can find suave steakhouses and eclectic ethnic fare with over 100 restaurants within blocks of each other. For an afternoon spree, comb the specialty boutiques or visit the famous Horton Plaza.

## Coronado

Rich in history, natural beauty and a charming ocean village atmosphere, Coronado is most deserving of its royal "nickname" - the Crown City. Bordered by the Pacific Ocean, Glorietta Bay and San Diego Bay, this picturesque seaside city is linked to the Southern California coastline and the city of San Diego by the graceful and stately San Diego - Coronado Bridge, and to the south by a narrow strip of land known as the Silver Strand. This uniquely enchanting city, which measures only 13.5 square miles, is home to some of the world's most pristine beaches, 18 public parks, an 18-hole golf course, tennis courts, and recreational facilities.

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