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Timelines and Procedures for WSBA Sections Mid-year or Annual Seminar Programs ("Plan B" Programs -- Revised 12/3/08)

The following is a list of steps and general timelines for establishing a Section's mid-year or annual CLE program. In general these yearly programs or "Plan B" programs are the most significant seminars that a Section undertakes within a year, and may be one, two days or longer in length. While given complete assistance by WSBA-CLE the Section assumes all fiscal risk of the program and is responsible for all expenses including administrative costs of the WSBA-CLE Department. The Section receives all profit from these programs above these costs. It is not unusual for a Section to want to "give back" to its members by special programming such that revenue generating may be a secondary purpose. It is also not unusual for a Section to have a yearly business meeting during the course of the program. The programs must still follow guidelines as established by the WSBA-CLE Department under the oversight of the CLE Committee and Board of Governors.

1. <u>Establishing program dates:</u>

Discuss with CLE Department proposed dates for Section seminar. A general guideline is that the larger (both in anticipated attendance and duration) the program the longer lead time in scheduling is needed. Also to be taken into consideration is the proposed location of the program. More popular venues may require well over 12 to 15 months reservation lead time. Seminars can be scheduled at either of the two yearly CLE Dept./Section scheduling meetings, (November or May), or at any time the Section contacts the CLE Dept.

Scheduling should be minimally 9 months to 1 year in advance.

2. <u>Identification of Seminar Chairs:</u>

The Section is responsible for identifying the seminar chair(s) and this should be done as early as possible in the process; Chair(s) should be identified 9 to 11 months prior to the program. The WSBA- CLE Department strongly recommends that Sections develop a process in which the following years' Chairperson(s) is identified prior to the completion of the preceding year's program. This early identification allows for the next year's chairperson to watch and learn from the current chairperson(s) and build upon that work in the next year. (Another model is for there to be a lead chair with a co-chair who rotates into the lead position the following year.) Annual programs suffer when each year the entire process must be begun anew. Another important point is that the larger the program the more "support" is needed by the program chair(s) from the Section's Executive Committee. Help may be needed in not only finalizing programming but also in recruiting.

<u>General information</u>: WSBA-CLE has begun the process of identifying an ongoing Seminar Lead for each Section's annual/mid-year program. This will allow for the development of better teaming and more familiarity by WSBA-CLE in working with a Section on their annual program.

Please note: the two primary factors on why seminars do not enroll well are late naming of seminar chairs and late mailing of the seminar brochure, (often these are linked events).

Following Seminar Chair identification, the assigned CLE Depts. Seminar Lead will meet with the Seminar Chair(s) to begin program development discussions and initial marketing.

3. Recruitment of faculty:

Identification of faculty for the seminar should begin no later than <u>16 to 24weeks prior to</u> <u>the seminar date</u>. Earlier is even better.

4. Marketing:

The assigned WSBA-CLE Seminar Lead provides for the development and delivery of marketing of the program. The Seminar Lead works with the Section Chairs and the entire WSBA-CLE Department to provide the program's marketing. Initial marketing plans are begun when the Section establishes the program's chairperson(s) and they meet with the Seminar Lead.

5. Final Program Agendas:

Complete agendas are received by the Seminar Lead 12 to 16 weeks prior to the scheduled date of the seminar. Completed agendas include: the final name of all session titles; all faculty identified. During this time the Seminar Lead is working with the Chairpersons to also fill out the rest of the brochure requirements (e.g. learning points, principal marketing content, etc.)

6. Faculty:

WSBA-CLE Department sends out "Welcome Letters" and Faculty Packets to all identified faculty. The packets include specifics as to program logistics, material deadlines, material guidelines, contact persons, reimbursement information, etc. Faculty are asked to submit short bios as soon as possible.

- 7. <u>At 10 weeks out the seminar brochure should be in final completion stage</u>. Brochures that are completed less than 8 weeks out are the major reason programs do not enroll well.
- **8. 8 to 10 weeks prior to seminar**, first mailing of Seminar Brochure. The first mailing of the brochure may go to a widespread possibly interested population as well as those identified as specifically interested. An earlier program notification (i.e. save-the-date card) may be sent out

9. 4 weeks prior to the seminar date:

Materials from the faculty are to be turned in (steps and procedures outlined in speaker packets).

- **10. 4 weeks prior to seminar a "reminder" brochure** may be mailed to a very targeted smaller group of potentially interested persons. An electronic notification (blast email) may go out in this time period.
- 11. <u>3 weeks prior to the seminar</u> the CLE Department's Program Coordinator will contact each faculty member to check any audio/visual needs or whether there will be a powerpoint presentation.

12. Faculty meeting:

Between 1 and 4 weeks out Faculty meetings should be held to allow the flow of the seminar to be detailed, ensure no overlap in material covered, discuss seminar format, clarify roles if needed, (e.g. panel moderators), discuss special circumstances, answer faculty questions, discuss presentation formats, etc. Seminars that have faculty meetings are simply better programs than those that do not. The Seminar Lead will assist in organizing the Faculty meeting.

13. During the final week prior to the program:

A reminder email is sent to all faculty by the CLE Dept. with program details.

14. <u>Day of Program:</u>

WSBA-CLE staffs the program. Program Chair(s) ensure the maintenance of the program schedule. It is very important that the program is followed as a courtesy to registrants and to faculty and also to ensure that MCLE credit is earned at the advertised amount. Evaluations are distributed with course materials and available for review usually a week after the day of

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the program by Chairperson(s); an individual faculty may review his/her own evaluation information.

15. <u>Fiscal review:</u>

The Seminar Lead will provide a preliminary fiscal review for the Section within 30 days and if possible a final fiscal review within 60 days. (very often all expenses, especially faculty expenses are not turned in within shorter time frames).