



WSBA

ADVANCEMENT DEPARTMENT

**CLE Committee Meeting
Minutes
July 31, 2013**

DRAFT

Committee Members Present:

Chad Dold, Jason Dennett, Marijean Moschetto, Qingqing Miao, Richard Sayre, Robert Klein, Sheila Ridgway, Susan Machler, Tracy Grant

By Phone:

Brita Long, Tara Gillespie

WSBA Staff Present:

Christopher Cellars, Janey McCaulley, Kathy Burrows, Margaret Morgan, Megan McNally, Paula Littlewood, Stacy Holmes

Absent:

Anthony Ravani, Dianna Caley, Douglas Reiser, Hillary Evans, Jeanette Nyden, Lewis Zieske, Mark Arend, Mike Jorgensen, Stuart Brown, Susan Strachan

Welcome, introductions

Marijean Moschetto, Chair welcomed attending members and staff.

Approval of April 18, 2013 meeting minutes

The CLE Committee approved the April 18, 2013 meeting minutes with no changes.

The future of WSBA CLE and the CLE Committee

Megan McNally, Director of Advancement/Chief Development Officer discussed goals for WSBA's continuing legal education and the CLE Committee following the 2013 organizational mission realignment. The transition prepares WSBA to achieve the Board of Governors' strategic goals related to educating lawyers with the skills and competencies for a changing profession. Going forward, WSBA's CLE seminars will focus on:

- Substantive areas of law, primarily in partnership with WSBA practice sections

- Ethics and professionalism
- 21st century practice skills – such as technology and business skills for practice, and how to stay healthy in the practice (work/life balance)
- A limited number of other “hot topics” that span multiple sections and that require statewide leadership

At the direction of the BOG Committee on Committees, WSBA will spend 2014 re-assessing the role of the CLE Committee in this new era of continuing legal education. Megan stated a commitment to involving current and past CLE Committee members and WSBA staff in this discussion.

Paula Littlewood, Executive Director, offered additional insight into the Committee on Committees. Committees carry on tasks of the BOG. An estimated 900 volunteers staff the various WSBA committees. Each committee prepares an annual report, which reports have in the past been reviewed by the BOG. Due to the high volume of material the BOG has to review, this process does not work very well. The Committee on Committees has, for the past three years, taken the reports and broken them down for an annual presentation to the BOG.

Highlights of the ensuing discussion follow:

- Is the seminar revenue after the transition to be more focused? (Dick)
 - WSBA needs to integrate the talent of staff and commit toward focused goals. (Paula)
- What is the difference between a high volume seminar and the accompanying strategic goals? (Jason)
 - Response: 1) staff frenzy 2) the C.O.O must draw the line on a seminar making \$5K only. It is not quantity but quality. 3) the entire organization needs to benefit from the knowledge and expertise of WSBA CLE staff making it a true partnership. This includes ethics and preparation for the practice of the 21st century. (Paula)
- Goal to increase registrations at mid years, Solo and Estate Planning significantly. (Paula)
- A video that trains up chairs on how to prepare a good seminar will help move the goals forward. (Bob)
- More people giving a good presentation will grow repeat customers. (Tracy)
- How can quality control goal be enhanced other than committee members auditing two to three seminars per year? (Qingqing)
- Staff needs to train speakers to make presentations more interesting (Dick)
- A committee member would like to present at CLEs but wants significant public speaking training (fast track) 1X/year or 1X/2 years. (Brita)
 - The focus should be on learning objectives more than great speaking (Paula)
- The CLE Committee needs to focus on WSBA. (Paula)
- The Bar should train its members to have better presentation skills to all entities, e.g. rotary. (Bob)
 - A comment was made that Toastmasters specializes in skill building with safe feedback. Speaking publically is an acquired skill and good training results from paying more attention to the way people learn.
- Re: Solo & Small Practice – The transition’s slowness and focus is helping to put focus on presenters allowing us to put our emphasis on the goal. Would have liked to spend more time with the 40+ presenters. We are looking at other modalities for presenting, e.g. ‘on the round’ (Chris)
- Would like more partnering and teaching members to teach presenters around the state. (Dick)

Working Together to Champion Justice

- Sue Strachan will provide great support to relationship building with other bars, therefore CLEs in her new role. (Paula)
- CLE's new direction brings excitement and focus on educational objectives. Attorneys can do it better and longer. (Kathy)
- Quality Control can be more involved in seminar development. (Margaret)

CLE speaker recruitment: developing a new and diverse group of highly skilled presenters

Action: Megan will distribute the Diversity and Inclusion Plan to CLE Committee members (done as of this writing).

Megan said she hears that bars that have created more structure as well as policy around goals to increase diversity in faculty and leadership tend to have better results. She looks forward to the Committee's help designing a formal program and goals related to diverse faculty recruitment and development. WSBA has redirected one of its staff positions to support this effort: a new HR specialist for diversity is currently being recruited.

CLE Committee subcommittee reports

- **Technology Subcommittee (Jason)**
 - Project Update: CLE speaker tips and tricks: How to give an effective presentation.
 - First draft due by next meeting. Some areas have been identified to make more presentations. Maji Jean suggested building method of presentation around subject being presented.
- **Quality Control Subcommittee (Chad)**
 - Project Update: Roundtable of successful chairs on building a seminar.
 - Used the 360 evaluation and all stakeholders to try to find out what they need to understand what a scorecard would look like at the end of a CLE. The subcommittee concludes that the 360 evaluation model does not work. Educational objectives need to be set before each seminar. Bob thinks that the video will make a difference and completion by October is doable. Chris evaluated the feedback and wants to look at quality control. The culture needs mixed older/newer attorneys.
- **Sections Relations Subcommittee**
 - Project Update: Seminar chair's responsibilities in developing section-sponsored programs
 - Marijean suggested discussing this topic at the next section leader's conference in November.

Next meeting

The next CLE Committee meeting is on October 31, 2:00-4:00 p.m.

Adjourn

The meeting adjourned at 3:45 p.m.