

EBA Program Planning Guide: *Tips to Plan an Event*

SELECT A TOPIC

- Confer and coordinate with other committees and chapters as appropriate
- Determine subject matter(s) and potential speaker(s)
 - *Please note: all panels need to be diverse.*
- If the topic or speaker may be controversial:
 - Seek a balanced presentation
 - Must be clear that EBA does not endorse a position or speaker
- Programs have a sponsorship and attendance goal (see below)
- Strongly consider use of remote/regional access to program in planning structure

SELECT A FORMAT

- Formats:
 - *Half-Day events:* one 2.5 hours to a half-day program covering two or more subject areas -> examples: panel, workshop, panel + reception
 - *Energizer* → short educational program, typically an hour, live and/or conference call or WebEx in which one or more speakers’ present information on a current event in a particular subject matter.
 - Networking only event
 - Determine if it will be in-person, virtual, or hybrid.
- Determine if CLE will be offered
 - Contact Olivia Dwelley (odwelley@eba-net.org) and Jack Hannan (jhannan@eba-net.org), for guidance and additional requirements. **See the next page for a more detailed explanation of CLE requirements.*
 - We will only be applying for CLE for Half-day events, not Energizers.
- EBA sets registration pricing fees - these are predetermined by the EBA Board of Directors
- Confirm your financial sponsors

LOGISTICAL CONSIDERATIONS - *Understand site needs in advance*

- Connect EBA Meeting Coordinator with on-site contact at host location to confirm logistics
- Connect EBA Meeting Coordinator with on-site IT department to determine technology logistics
- Meeting room set-up and capacity
- On-site registration support (if EBA staff does not attend)

MEETING EXPENSES AND REGISTRATIONS FEES

PLEASE NOTE: Remember, all events are “EBA Events”, even if hosted by an outside entity (law firm, corporation, university, etc). As such, all EBA pricing and attendance policies apply and any changes/additions to a meeting must first be cleared through EBA before going into effect.

- Registration fees and financial sponsors are predetermined by EBA Board of Directors.

<u>Event Type</u>	<u>Member Fee</u>	<u>Non-Member Fee</u>	<u>Sponsorship: Premium/Regular</u>
Energizer	Free	\$40	\$600/\$300
Half-Day	\$75	\$95	\$400/\$200

- Seek to defray costs:
 - Seek to use law firms/corporate conference rooms free of charge.
 - Consider if the site provider will donate food/beverage.
 - Speakers, Sponsors, and Committee Chairs are the only ones with Comp'd registration.

EVERY CLE PROGRAM NEEDS:

1. Timed Agenda (30 days in advance)
2. Speaker Bios (30 days in advance)
3. Course Materials for each individual session (ideally, 30 days in advance. Depends on the state for which credit is sought)
4. Final list of verified attendees that met duration and secondary participation for at least one session (Or for whole program if is a single session)

TIMED AGENDA

The Timed Agenda should include the following information:

- Title of the program
- Date of the program
- Program description of total program
- Session descriptions for each session of multi-session program
- Start and end time of each session for multi-session program
- Start and end time of total program for single session program
- **Learning objectives for each session that offers specialty CLE credit**
- Speakers and their credentials (title, company) for each session
- Format (Live In-Person, Live Webinar, Live Moderated Webinar, On Demand, Virtual)
- In-person location

SPEAKER BIOS

3-4 sentences that provide the speaker's name, current title, current company, their practice area and expertise, education and degrees. Please also include the current city and state of residence for each speaker.

COURSE MATERIALS

Course materials that satisfy MCLE requirements are substantive in nature and have some level of analysis. If a person were to reference these materials a year from now would that person derive the basic knowledge provided in the presentation from these materials?

Powerpoint slides that are only bullet points and pictures typically do not qualify.

Examples of things that do qualify on their own include:

- original papers written by a panelist, powerpoint/prezi/google slides that have substance and depth
- previously printed papers with copyright permission along with an outline referencing the current program presentation
- hypotheticals paired with rules and answers
- outlines referencing the current program presentation paired with scholarly journal articles
- detailed outlines typically longer than 10 pages
- case law articles or draft legislation as reference **with** an outline or analysis,
- a combination of these bullets together

If you are not sure your course materials will qualify for CLE credit, feel free to ask!

VERIFIED ATTENDEE LIST - EBA will track and submit this