



# WSBA

## EDUCATION AND OUTREACH

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### **Timelines and Procedures for WSBA Sections “Plan A” Programs** (Revised 12/3/08)

The following is a list of steps and general timelines for establishing a Section’s standard (non-midyear or annual) CLE program. In general these one day programs or “Plan A” programs are content specific to a Section but may also include joint programming with another Section. WSBA-CLE and the Section assume equal fiscal risk of the program. After all costs (including administrative charges) are addressed the Section and WSBA-CLE split all profit or share equally in all losses. Scheduling for the program generally occurs in discussions between the Section and WSBA-CLE in either individual communication throughout the year or at the twice yearly scheduling meeting between Sections and WSBA-CLE. The programs must follow guidelines as established by the WSBA-CLE Department under the oversight of the CLE Committee and Board of Governors.

**1. Establishing program dates:**

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. **Scheduling should be 9 months to 1 year in advance, though 6 months to 9 months can occur if related programming is not already in place.** Even shorter timelines are possible. In case of a “late breaking” change in a practice area timeframes can occur within a few months but require excellent communication between the Section and WSBA-CLE.

**2. Identification of Seminar Chairs:**

The Section is responsible for identifying the seminar chair(s) and this should be done as early as possible; Chair(s) should be identified within one month of establishing a tentative program date. For programs being established within a six month timeframe WSBA-CLE may ask for a chair to be identified before confirming a program commitment. **General information:** WSBA-CLE has begun the process of identifying an ongoing Seminar Lead for each Section’s annual/mid-year program; that same Seminar Lead may not be available for one day programming but every attempt will be made to have the Seminar Lead assigned to the Section’s program.

Please note: the two primary factors on why seminars do not enroll well are late confirmation of seminar chairs and late mailing of the seminar brochures, (often these are linked events). Following Seminar Chair identification, the assigned WSBA-CLE Departments’ Seminar Lead will meet with the Seminar Chair(s) to begin program development discussions and initial marketing.

**3. Recruitment of faculty:**

Identification of faculty by the Chairperson for the seminar should begin no later than **16 to 24 weeks prior to the seminar date.** Earlier is even better.

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4. **Marketing:**  
The assigned WSBA-CLE Seminar Lead provides for development and delivery of marketing for the program. The Seminar Lead works with the Section Seminar Chair(s) 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 to be 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 and all faculty identified—a brief description of the session is also very valuable. During this time the Seminar Lead is working with the Chair(s) to also fill out the rest of the brochure requirements (e.g. learning points, principal marketing content, etc.)
6. **Faculty:**  
WSBA-CLE Department sends "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. **At 10 weeks out the seminar brochure should be in final completion stage.** 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.
9. **4 weeks prior to the seminar date:**  
Materials from the faculty are to be turned in (steps and procedures outlined in Faculty packets).
10. **4 weeks prior to seminar a "reminder" brochure** may be mailed to a very targeted smaller group of specifically interested persons. An electronic notification (blast email) may go out in this time period.
11. **3 weeks prior to the seminar** 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 if assistance is needed.
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. **Day of Program:**  
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 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 the program by Chair(s); an individual faculty member may review his/her own evaluation information with the Seminar Lead.
15. **Fiscal review:**  
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).

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