# MCLE Guide to Chairing a Program

A HANDBOOK FOR MCLE PROGRAM CHAIRS

- Defining the Learning Objectives
- Recruiting Volunteer Faculty
- Drafting the Program Brochure
- Conducting the Planning Meetings
- Assembling the Written Materials
- Orchestrating the Day of the Program
- Evaluating the Program
- Leveraging Support from MCLE's Staff

MCLE
Keep raising the bar.®

Dear Colleague,

Thank you for agreeing to serve as an MCLE chairperson.

With over 50 years of experience in providing continuing professional education for Massachusetts lawyers, MCLE has earned a national reputation for excellence in CLE. The strength of the organization is based in large measure on the hard work and goodwill of its volunteer faculty. We greatly appreciate your willingness to volunteer your time and expertise, which helps us to maintain our high standards in MCLE presentations and course materials.

As program chair, you serve as the “audience’s advocate,” taking the lead in determining the program’s content and format, drafting the brochure, recruiting the faculty, assembling the written materials, moderating the presentations on the day of the program and evaluating the program once concluded. This position requires a significant time commitment in order to ensure that the program is of the highest quality. You will work closely with one of MCLE’s Program Attorneys, who will provide you with any assistance you require to better enable you to develop and produce a successful seminar. In addition, during each phase of the program’s development, you will be able to rely upon the services and support of MCLE’s program staff, including our program assistants, technical services staff and marketing department to assist you in creating a superior product.

This Guide is provided to assist you in preparing for your seminar. We encourage an emphasis on practical content in both the written materials and oral presentations. As you know, a lawyer’s primary reason for enrolling in an MCLE program is to upgrade or expand his or her practice abilities. Ideally, participants will leave your program confident in their ability to incorporate the information, insights and techniques presented at the course into their daily practice.

We hope your experience as an MCLE chairperson is pleasant and rewarding. I invite you to contact our staff if you have any questions or concerns regarding preparation for your upcoming seminar.

Sincerely,

JM Reilly

John M. Reilly, Esq.
Executive Director

Jonathan C. Small

Jonathan C. Small, Esq.
Director of Programs

# TABLE OF CONTENTS

*Part 1*

# Defining the Learning Objectives

## PLANNING THE CURRICULUM

MCLE plans its curriculum based on changes in case law, new legislation or regulations and emerging practice issues. Additionally, central to each practice area are offerings in the fundamentals that all new lawyers need for practice. MCLE's underlying institutional objective, common to each and every program, is to teach participants useful information they can incorporate into their everyday practice. Registrants should be confident that the written materials and oral presentations provide up-to-date and exhaustive coverage of the subject.

## CONTRIBUTING YOUR EXPERTISE

MCLE looks to your experience and expertise in determining program content within the overall program objectives. With that in mind, you should initially take some time to review the program's objectives and consider how best to satisfy them. Consider the time allotted for the program and the experience level of practitioners for which the program is targeted. Prepare an outline of the information with which a registrant should come away from the program.

## USING PRIOR COURSES AS A LAUNCHPAD

If the topic of your course has been included in past MCLE offerings, such as in fundamentals courses that are held on an annual basis, the Program Attorney will provide you with the following materials on file from the past program:

- prior brochure,
- lesson plans, if available,
- the program agenda outline,
- written course materials, and
- a course evaluation summary.

These materials will provide you with a context for content development and marketing appeal. Additionally, the Program Attorney will provide you with any comments about the program stemming from our Curriculum Advisory Committee meetings, during which all MCLE programs are reviewed by your colleagues. You are encouraged to use these materials as a point of departure in developing the presentation. You are further encouraged to edit them aggressively to reflect substantive updates, registrant feedback and a freshness of approach. Because MCLE refines its seminars and materials through repetition, this is now an opportunity to improve upon earlier presentations.

## FOCUSING ON PRACTICAL INFORMATION

When determining program content, keep in mind that practitioners attend MCLE seminars because they want practical information that they can incorporate into their practice. As such, the seminar must aim not only to identify the most current legal issues, but also to explain how those issues play into practitioners' day-to-day representation of clients. The participants must be taught how to apply the concepts addressed throughout the program.

## EMPLOYING VARIED TEACHING METHODS

A program's content is helpful only to the extent that it is absorbed by the audience. We have found that registrants appreciate and respond to varied and interactive educational techniques. While some concepts are best conveyed via a conventional lecture format, there is almost always an opportunity to supplement this with nontraditional teaching methods. Some of the methods and combination of methods that we have found to be effective include:

### *Faculty Demonstrations/Role-Playing*

Members of the faculty demonstrate a particular skill as part of their presentation. For instance, a lecture on making an oral argument could be followed by a mock summary judgment argument.

### *Hypothetical Case Studies*

As a supplement to a lecture, the faculty present a hypothetical fact pattern that raises many of the topic's practice issues. They then explain how they would handle such a case. You can also pose variations of the problem to foster additional debate.

### *Breakout Discussion Groups*

As part of the program, registrants break into small groups with individual faculty members to discuss practice issues.

### *Case Clinics*

As part of the program, registrants meet with faculty to discuss individual cases on which the registrants are working.

### *Registrant Exercises*

During the program, students are quizzed on topics covered or asked to respond to hypothetical situations.

### *Question and Answer Sessions*

Time is allotted throughout the program or at the end of the session for you to solicit questions from the audience and have members of the panel respond. Encourage questions and answers live from the floor.

You can also request that registrants submit written questions to maintain more control of the discussion.

## UTILIZING DEMONSTRATIVE AIDS

Technical and visual aids can also turn a standard lecture into a cutting-edge presentation. We have numerous resources to assist speakers, from simple flip charts and overhead projectors to Power Point hookups and Internet connections. Program formatting is a matter in which we have considerable expertise. Let our Program Attorney and audiovisual technician assist you in developing an innovative and original presentation.

## INCORPORATING ETHICS ISSUES

Always consider whether there are ethical issues about which attorneys need to be cautioned. As part of its mission, MCLE attempts to integrate ethics education into all of its programs.

## REFERENCING AVAILABLE TECHNOLOGY

Speakers should be encouraged to inform registrants of available technology to assist them with their practice.

## PROVIDING PRACTICE MANAGEMENT TIPS

Many of MCLE's registrants are small firm or sole practitioners. As such, part of the program should be dedicated to providing tips for running a more efficient practice.

## REVIEWING MCLE'S SEMINAR FEATURES CHECKLIST

Please refer to the *Seminar Features Checklist* on the following page, which provides a synopsis of the components of a quality program gleaned from MCLE's 40-plus years of experience presenting seminars.

## MCLE Seminar Features Checklist

- ❑ **Proactive Chair to facilitate content delivery.**
  The chair takes the lead in determining the program's content and format. The chair is responsible for guaranteeing that the substantive content promised in the brochure is delivered by the faculty. An effective chair directs questions to the panelists throughout the program to help clarify points being made during the presentations. The chair acts as moderator for panel discussions and fields questions from the audience, repeating the question after it is asked. The chair keeps the program running smoothly and on schedule.

- ❑ **Speakers with substantive expertise and presentation skills.**
  Faculty panelists are experienced practitioners with a particular focus on the relevant practice area. Presenters are effective public speakers with a sensitivity to the varied adult learning styles of the registrants.

- ❑ **Examples illustrating practice application.**
  At the core of any effective MCLE presentation are specific examples which link theory to practice. Our registrants expect pragmatic solutions and specific recommendations which they can immediately apply to their practices.

- ❑ **Agenda and written materials.**
  Each MCLE program has a written agenda, copies of which are distributed to registrants on the day of the program. In addition, MCLE's audience relies on and expects to receive comprehensive, practical, up-to-date written materials supporting the oral presentations. Exhibits which support the course materials and are on point with course content should appear at the end of the written materials.

- ❑ **Questions and answers and other interactive, participatory opportunities.**
  Opportunities are provided for the audience to ask questions, either after each speaker, at several designated intervals, or at the conclusion of the program. When appropriate, there is also an opportunity for breakout groups (small groups with individual faculty members), roundtable discussions, or case clinics.

- ❑ **Visual aids and varied presentation formats.**
  From traditional overhead projection to cutting-edge Power Point presentations, all seminars include visual aids when appropriate. Although

standard lecture format is often effective, other presentation methodologies should be considered, including use of hypotheticals, panel discussions, and participatory workshops.

- ❑ **Business, technical and ethical commentary.**
  When relevant, practice-specific commentary is offered by the faculty panelists. For example, information about document assembly software should be included. Practice management issues should be addressed. In all programs, ethics must be discussed. Our audience expects to receive advice on ethical issues from all of the experienced panelists.

- ❑ **Judicial or regulatory commentary (if applicable).**
  When a state or federal judge or government regulator is a faculty participant, the perspective from the bench or agency enhances the program. Commentary may be offered throughout the seminar or via a self-contained lecture. Judges might also preside over a mock hearing or trial.

*Part 2*

# Recruiting Volunteer Faculty

## SELECTING AN EXPERT FACULTY

Choosing faculty members is the single most important phase of program planning. The program doesn't get any better than the presenters. In addition to the requisite substantive expertise and practical experience, we seek volunteers with excellent presentation skills and the willingness to put in the time to contribute to a professional presentation. Resist the temptation to coax the participation of a reluctant volunteer or to negotiate away MCLE's standards of excellence. The volunteer faculty must express the willingness and ability not only to provide an excellent oral presentation during the day of the program, but also to attend preprogram planning meetings and contribute well-prepared written materials in a timely manner. Therefore, when considering whether to invite back a member of a prior panel, please review both the evaluation summary to ensure that the presenter was well-received and the course materials to confirm that he or she fulfilled his or her commitment to provide current, practical and substantive written materials.

## UNDERSCORING FACULTY'S DUAL RESPONSIBILITY TO SPEAK AND WRITE

When recruiting faculty, it is imperative that you underscore the dual responsibility of each member to author written materials and give an oral presentation. MCLE's audience relies on and expects to receive comprehensive, practical, written materials supporting the oral presentations. Please emphasize this expectation when recruiting faculty volunteers. Avoid welcoming a former volunteer who is not willing to put in the time to update his or her written materials.

## EMPHASIZING CURRENCY OF MATERIALS

The currency of the written materials is of foremost importance to the registrants and, consequently, poorly developed and out-of-date materials jeopardize the substantive integrity of the program. Keep in mind that the course book will be referred to long after the course is over. No matter how compelling the oral presentations, MCLE's audiences give low ratings to programs with weak written materials.

## Recruiting a Diverse and Interdisciplinary Faculty

When recruiting faculty members, please remember that we seek diversity on our panels. Factors to consider include gender balance, racial or ethnic mix, geographical variety, government service, plaintiff and defense perspectives, as well as both large firm and small firm orientation. Consider also the benefits of utilizing professionals from other disciplines, such as government regulators, accountants, scientists, etc.

*Part 3*

# Drafting the Program Brochure

## SELLING YOUR SEMINAR!

Now that you have thought through the objectives of the course, it is time to consider how best to market the program to potential attendees. The program chairperson is asked to draft a one-page brochure that MCLE will include in its bimonthly catalog and collateral marketing pieces to advertise the seminar. This is the singular opportunity to showcase the program and faculty. We know from years of experience that well-written course objectives can increase attendance significantly. Given the time and commitment it takes to prepare your program, we know you want it to be as well-attended as possible. It is imperative that the brochure send a message that is both accurate and dynamic. It must describe both the topics and the teaching formats to be employed.

## INVOLVING FACULTY IN THE CREATIVE PROCESS

While you will be the one to write the draft, the Program Attorney and your faculty should be involved in the creative process in order to ensure that the brochure comports with the information actually presented at the seminar. Tight schedules and quick turnaround of MCLE's marketing campaigns make it difficult, if not impossible, to make changes to brochure copy once the marketing cycle begins. Therefore, it is imperative that the first program planning meeting be scheduled prior to the brochure deadline so that the entire faculty has an opportunity to contribute to the program design. This creative collaboration not only results in a better program, but promotes volunteer faculty commitment. Also, it gives each participant an opportunity to double-check names, titles and professional affiliations. Because MCLE's programs provide faculty with significant professional visibility, we make every attempt to ensure the accuracy of our faculty listings.

## DRAFTING THE BROCHURE

To assist you in drafting the brochure, we have prepared these simple guidelines to be followed by busy lawyers who are not professional copywriters.

By "well written," we don't mean flowery, glitzy or hype-laden. We do mean complete, clear and specific.

*Please see the sample brochure on the following page.*

# How to Handle a Car Crash Case

*Fundamentals*

## *Issues of Insurance and Litigation*

### WHY ATTEND?

Representing an injured client or defending an alleged tortfeasor in a “simple” motor vehicle accident only seems simple to those who do not do it. It is essential for attorneys to know the typical and not-so-typical issues that arise in car accident cases, how to negotiate, when to settle and how to decide if the settlement is reasonable. Our expert panel guides you through the intracacies of motor vehicle torts, from understanding the basic auto insurance policy to valuing your client’s case.

### YOU WILL LEARN

- Issues of proof and disproof of negligence and causation.
- The pitfalls in insurance policies, particularly concerning PIP and uninsured and underinsured vehicles.
- What you need to know in claims involving the MBTA.
- How to value the case and when to decline a case.

### SPECIAL FEATURE
**Case Clinic–Bring Your Files**

Throughout the day, registrants will have the opportunity to meet one-on-one with a member of the seminar faculty to review your case files. Let an experienced attorney look over your shoulder as you screen, evaluate, assemble and price a car crash case. Learn how to recognize and avoid the “dog” cases, how to investigate and prepare the good ones, what information the insurer needs to evaluate the cases, how to price a case and how to approach settlement discussions. Go back to the office reassured and with sharpened focus!

### AGENDA AND WRITTEN MATERIALS

Understanding the Standard Insurance Policy

PIP; Pitfalls of uninsurance and underinsurance and liability coverages

Taking the Case/Client Interview/Fact Gathering

Negotiation and Settlement

MBTA; Special Considerations; G.L. Chapter 258 Entities and the Public Duty Rule

Evidentiary Points

Plaintiff’s Trial Perspective

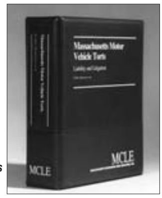
Defendant’s Trial Perspective

What Is It Worth?

*Seminar Text*

## Massachusetts Motor Vehicle Torts

***Hon. R. Marc Kantrowitz et al.***



*Massachusetts Motor Vehicle Torts* provides specific information on standard insurance policies, annotated with an analysis of insurance coverage; special concerns when dealing with governmental entities, e.g., the MBTA; liquor liability, such as dramshop and social host; accident reconstruction and demonstrative evidence; how to analyze medical data and make use of various experts; the relationship among outside defense counsel, insurer and insured; and how to get the very best results for your client.

***No. 95-17.10-BK, © 1994, 804 pages (looseleaf), with Forms on Disk, $75 (includes all supplements)***

**TO REGISTER SEE PAGE 63 OR CALL 1-800-966-6253**

### FACULTY

Norman J. Fine, Esq., Co-Chair
*Fine and Veznaian, PC, Boston*

Edward P. Ryan, Jr., Esq., Co-Chair
*O’Connor & Ryan, PC, Fitchburg*

Marylin A. Beck, Esq.
*Law Office of Marylin A. Beck, Dedham*

John J. Curley III, Esq.
*McEvilly & Curley, Leominster*

Jonathan P. Feltner, Esq.
*MBTA Legal Department, Boston*

Karyn T. Hicks, Esq.
*Morrison, Mahoney & Miller LLP, Boston*

John F. Keenan, Esq.
*Wolfson, Keenan, Cotton & Meagher, Worcester*

Thomas M. Neville, Esq.
*Segalini & Neville, Waltham*

Kathleen M. O’Donnell, Esq.
*Marcotte Law Offices, Lowell*

John A. Wickstrom, Esq.
*Tashjian, Simsarian & Wickstrom, Worcester*

### FRIDAY, SEPTEMBER 19 9:30 A.M.–4:30 P.M. WORCESTER

Crowne Plaza Hotel Worcester
(formerly the Marriott)
10 Lincoln Square
Seminar No. 98-17.01-WO

### FRIDAY, SEPTEMBER 26 9:30 A.M.–4:30 P.M. BOSTON

MCLE Conference Center
Ten Winter Place, via Winter Street
Seminar No. 98-17.01-MC

### TUITION *includes written materials*

- Nonmembers........................................$155
- MBA/BBA Members.............................145
- MCLE Sponsor Members......................135
- Pending Admittees, New Lawyers Admitted to the Bar after January 1993, Legal Services Attorneys and Paralegals Who Are
  - Nonmembers.........................................85
  - MBA/BBA Members............................75
  - MCLE Sponsor Members....................65
- Students...................................................65

Tuition includes a subscription to *Massachusetts Motor Vehicle Torts*, which will be distributed as course materials on the day of the course. Deduct $25 from your tuition if you already own the book. With MCLE’s automatic supplementation service, supplements are mailed automatically with an invoice. If you do not wish to subscribe, please note on order form.

### CAN’T ATTEND?

*Available after October 3*

Written Materials . . . . . . . . . . . . . . . . . . $75

Audiocassettes
*includes MA sales tax* . . . . . . . . . . . 89.25

## *Title and Subtitle*

Make sure this includes the benefit of attending the course, not just the name of the subject. Write both a title and subtitle.

WRONG: Corporate Practice

RIGHT: How to Incorporate and Counsel a Business
*From Choice of Entity to Corporate Maintenance*

## *"Why Attend?" Section*

Write one or two paragraphs which describe the problems the course will help solve, why such a course is needed and the course approach. Write in the present tense.

For example, "This seminar takes you step-by-step through the closing process."

Length: 100 - 150 words

## *"You Will Learn" Section*

Here you should provide a list of at least five bulleted items that describe benefits the attendee will receive. (It's fine if this repeats some of the items in your *Agenda and Written Materials*

Begin some benefit statements with one of the following words:

Who. . .
What. . .
When. . .
Why. . .
How. . .

Do *not* begin with:

To . . .
About . . .
An . . .
A . . .

(It will sound boring.)

## *"Agenda and Written Materials" Section*

This is a concise description of what you will cover. It should have at least five parts. The heading of each part should be the **benefit** of having heard that part, not just the name of the subject.

WRONG: Forms of Organization

RIGHT: How to Choose the Most Appropriate Organizational Form

This section may repeat some of the items in your *You Will Learn* section.

## General Copywriting Tips

Here are some general writing tips to consider for the text:

- A picture is worth a thousand words. If you have a chart or a table that illustrates your points, include it; we'll print it.
- Use action-oriented, conversational words.
- Do not use "hype." Do include as much detail as possible in each of your points.
- Write in the active, not passive voice and use the word "you" as often as possible.

WRONG: Equity-based incentive compensation will be reviewed.

RIGHT: You will learn the pro's and con's of equity-based compensation schemes.

- Use words and phrases, not sentences. This enables you to get more substance in less space. Livelier, more compact, easier to read.
- Be specific. Describe a law that was enacted in June, 1996, not "recently." Or a technique that reduces paperwork by 37 percent, not "substantially." The more vague you are, the less readers continue reading.
- Enumerate wherever possible.

EXAMPLES:

> "The five most important provisions of . . ."
> "Four techniques for . . ."
> "Three different types of . . ."

- Include at least one unique thing in every course and highlight it by placing an asterisk after it and including a footnote that says:

  "* new material presented here for what is believed to be the first time anywhere."

- Remember the "golden rule."

  DON'T TELL ME ABOUT YOUR GRASS SEED; TELL ME ABOUT MY LAWN!

In other words, emphasize the **benefits to the attendee**.

WRONG: Breathalyzers will be discussed.

RIGHT: You will come away with a solid understanding of how breathalyzers work.

*Part 4*

# Conducting the Planning Meetings

## CONDUCTING THE FIRST PLANNING MEETING

Preparing a well-executed program requires that you, all faculty members and the MCLE Program Attorney meet a minimum of two times prior to the program. These meetings are crucial to the success of every program because they enable the faculty members to focus on the objectives of the program, define the target audience, discuss the use of various pedagogical formats and agree upon the scope and content of the written materials.

To ensure that the content of the program matches the advertised course description in MCLE's catalog, the first planning meeting must be held prior to the MCLE catalog deadline. The meetings generally run for about one and one-half hours, so we recommend holding a luncheon at MCLE for panelists' convenience. During the first meeting, you and the Program Attorney should work with the other faculty members on the following issues:

### *Program Objectives*

The first questions you must ask are "What do we want the audience to learn during the program? What will they know at the end of the program that they didn't know before?"

### *Target Audience*

You also need to determine your target audience. Is this an entry-level basics course or for more advanced practitioners? Are the participants likely to represent large law firms, solo practitioners, or both? Answering these questions will help you define the content of the program.

### *Topic Content*

Discuss the content of the program particularly as it relates to the target audience. What are their immediate needs? If it is an entry-level fundamentals course, the program should provide an overview of the subject matter. Other considerations:

- Are there new developments in case law that need to be addressed, or legislation recently passed or in the works?

- Are there common practice mistakes that registrants need to watch out for?

- Are there ancillary topics of interest that could be highlighted?

- Would the registrants benefit from regulatory or judicial commentary or perspectives from an interdisciplinary faculty?

- Does the program design have compelling features? Does it foster interactive learning or, where appropriate, promote the use of technology?

## *Program Format*

Over the years, we have found that participants respond well to programs that disseminate information using varied and interactive educational techniques. Ask yourself and the other faculty members whether using the different teaching methods listed on pages 3–5 may reinforce the program content.

## *Written Materials and Deadlines*

Because preparing the written materials takes time, you and the Program Attorney should use the initial planning meeting to assign topics and to establish a firm deadline for the submission of materials. (Please refer to Part 5 for a detailed discussion of the preparation of the Written Materials.)

### *Brochure*

Prior to the first meeting, you and the Program Attorney will have already identified the faculty members, discussed the overall learning objectives and scope for the program, and prepared a draft of the brochure. The first meeting provides an opportunity for you to receive creative input from the faculty as to the content of the brochure. (Please refer to Part 3 for a detailed discussion of the preparation of the Program Brochure.)

## Sample Agenda for Initial Faculty Meeting

**MEMORANDUM**

To: The Rivers Protection Act and Regulations Faculty

From: Jonathan C. Small, Esq.

Date: July 22, 2000

Re: First Planning Meeting Agenda

********************************

I. Program Date: Wednesday, October 1, 2000; 2–5 pm

II. Review Learning Objectives

III. Select Program Format(s)

IV. Develop Detailed Seminar Agenda

V. Assign Presentation Topics and Responsibilities

VI. Review Draft of Brochure

VII. Written Materials

   A. Outline Scope and Content (including list of exhibits and appendices)

   B. Assign Responsibilities

   C. Deadline—September 3, 2000

VIII. Consider Use of Presentation Aids

IX. Schedule Final Planning Meeting

## CONDUCTING THE FINAL PLANNING MEETING

During the final meeting, you and the faculty should focus on the details of the substance of the program, the logistics of the presentation format, the written materials and the agenda for the program itself. You should ask yourself:

- Does the program agenda cover all of the issues outlined in the brochure? Is the program agenda realistic—can you cover all of the items in the allotted time?
- Are there any ethical issues about which attorneys need to be cautioned?
- Is there technology available to assist practitioners with practice management?
- Will the use of any audiovisual aids enhance the quality of the program: overhead projector, slides or on-line Internet hookup?

The MCLE Program Attorney and his or her assistant will take care of the logistics necessary to arrange the planning meetings. We strongly encourage you to meet at MCLE's downtown conference center because it serves to reinforce the faculty's commitment to MCLE and also enables them to familiarize themselves with the setting. If your program requires the use of visual aids, MCLE requires that you meet with our audio-visual technician to ensure compatibility between hardware and software—this can be done before or after a planning meeting. We find that programs that incorporate technology into the presentation run more smoothly when the faculty has done a dry run-through.

## Sample Agenda for Final Faculty Meeting

**MEMORANDUM**

To: The Rivers Protection Act and Regulations Faculty

From: Jonathan C. Small, Esq.

Date: September 3, 2000

Re: Final Planning Meeting Agenda

******************************************

I. Finalize Program Agenda
   Program Date: Wednesday, October 1, 2000; 2-5 pm

II. Collect and Review Written Materials

III. Discuss Program Design

   A. Compelling Features

   B. Interactive Learning

   C. Promote Use of Technology

IV. Ethical Issues

*Part 5*

# Assembling the Written Materials

## MEETING AUDIENCE EXPECTATIONS OF USEFUL MATERIALS THAT COMPLEMENT PRESENTATIONS

As discussed above, written materials are an integral part of the seminar experience: they are one of the main factors the audiences use in judging the quality and success of a program. MCLE cannot overemphasize the importance of useful and content-rich written materials. The materials must be current and comprehensive, and must reflect the content of the course and serve as a reference tool long after the program is over.

## INCLUDING PRACTICAL REFERENCE TOOLS

MCLE's focus is applied law and the course participants are eager for you and the faculty members to share your practical experience. As an extension of the oral presentation and on-site demonstrations, participants need a how-to text to serve as a reference handbook at the conclusion of the program. It is your responsibility to work with the Program Attorney to ensure that the written materials are user-friendly, practical and comprehensive. The best practice is to get each of the faculty to prepare original materials about the topic. In addition, registrants find particularly helpful practice tools such as sample forms and pleadings, checklists, summaries of related cases, charts, a list of relevant statutes, ethical commentary and a bibliography of other resources.

As discussed above, you will be the point person for assigning topics and reviewing materials for accuracy and thoroughness. There are two primary types of supporting course material:

### *New Written Materials*

MCLE expects that faculty members provide original materials to support their presentations. They should be aware of this expectation when they are recruited. Sometimes, if the program has been done in the past, you will have a prototype based on prior materials from which to model the materials. However, prior materials do not relieve the faculty of the job of providing comprehensive up-to-date materials supplemented with appropriate exhibits. In order to provide the participants with the best possible written materials, it is imperative that you carefully review any pre-existing materials and update and/or add new materials as necessary. Once again, the addition of checklists, sample forms, sample pleadings, etc., is often the difference between mediocre written materials and high-quality materials with a long shelf-life.

## *Utilizing Existing MCLE Publications*

In some instances, MCLE will have an existing publication in its practice library which complements a program. For example, *Preparing Estate Tax Returns* is used to support the program of the same title. In such cases, the faculty members are not required to provide additional written materials. However, the use of an existing publication should not discourage faculty members from providing handouts in addition to the book.

*Please refer to the Seminar Features Checklist on page 7, which provides a synopsis of the components of a quality program.*

*Part 6*

# Orchestrating the Day of the Program

At the outset of the program, the program administrator will introduce the program, cover some administrative details and introduce you. You will, in turn, provide a brief introduction of each of the faculty members. These should be no more than a few sentences each. More extensive biographical summaries are included in the written materials.

As the program chairperson, your role throughout the program is unique. By serving as both the audience's advocate and a moderator, you are in a position to make sure that we deliver what we promised, that the audience's needs are met and that the program stays on track in both substance and time. We find that a program is well-received when the chair is vigilant about the delivery of the subject matter and less involved in the actual dissemination of the information. As the chair, there are a number of teaching techniques you should consider.

## *Provide Overview of Program*

Start off the program by providing the audience with an overview of the agenda, the content of the written materials and a summary of what they will learn.

## *Survey of the Audience*

At the beginning of the program, ask the audience questions about their practice experience. This establishes a rapport with and engages the participants. More importantly, this provides you and your faculty with a better understanding of the audience. Also, by engaging the audience at the beginning of the program, you set the tone for the rest of the day.

## *Listen Critically to Faculty*

During the faculty presentations, listen critically to both the content and the delivery. Take notes. Has the faculty member left out an important issue? Were parts of the presentation unclear? Would an example clarify a particularly complex issue? What can you do to enhance the value of this presentation? Here, your role as chairperson is crucial because you can supplement an incomplete presentation or turn a mediocre presentation into an excellent discussion. You can do this by using some of the following methods:

- **Expound on an Issue:** If you think an issue is left unclear, before moving on jump in and either ask the faculty member to expound on the issue or take a few minutes and discuss it yourself.

- **Ask the Faculty Member a Question:** Interrupt a wandering discussion to bring the panelist back on track; or, at the end of the presentation, ask the faculty member a few pointed questions.

- **Open Up the Issue for a Brief Panel Discussion:** Ask other faculty members to give their opinion. This is particularly useful when the subject matter is unsettled or controversial.

- **Ask the Faculty Member for an Example:** To clarify the presentation, ask the faculty member to put it in context by providing an example; or pose a hypothetical problem and ask the faculty member how he or she would handle it.

- **Open Up the Floor for Questions and Answers:** Instead of waiting until a predesignated time for questions and answers, encourage participants to ask questions immediately following the presentation and throughout the day.

## *Ethical Considerations*

When appropriate, you should flag any ethical considerations raised by the subject matter.

## *Cancellation of Programs*

We rarely postpone or cancel our programs. In the event of a severe snowstorm, a decision is made by 6:00 a.m. and an appropriate message is recorded on MCLE's general voicemail greeting. The Program Attorney will contact you as soon as a decision is made.

On rare occasions, a program may be cancelled due to low enrollment. However, this decision is made in only the most unusual circumstances. We can never gauge accurately the number of at-the-door registrations likely to occur. Thus, even if preprogram registration is lower than expected, there is always the possibility of walk-up registrations. The Program Attorney will communicate with you as early and as often as possible regarding the possible cancellation of a program.

*Part 7*

# Evaluating the Program

MCLE is committed to providing the highest quality CLE programs. As an institution, we are consistently monitoring the successes of the programs and thinking of innovative ways to keep the programs fresh by improving upon the delivery of the content (both the oral presentations and the written materials). We rely on the input of the audience because they are the ultimate arbiter of a program's success.

At the beginning of each program, evaluation forms are distributed to all of the participants. The evaluations ask the participants questions about the content, presentation and faculty members. The evaluations are collected at the end of the program and read carefully by the Program Attorney, MCLE's Executive Director, and members of MCLE's Curriculum Advisory Committee. The results are collated and a synopsis is sent to the chairperson. The results are factored into future planning and programs.

Although at the beginning of each program the participants are strongly encouraged to complete the evaluation by the MCLE program administrator, we have found that unless the chairperson reinforces the request, response rate is low. MCLE cannot overemphasize the importance of the evaluations: the evaluations serve as our primary source of feedback.

As chairperson, we would appreciate it if, before the question and answer period or just prior to the conclusion of the seminar, you would stop the program for one minute and ask all of the participants to complete the evaluation form.

## Part 8

# Leveraging Support from MCLE's Staff

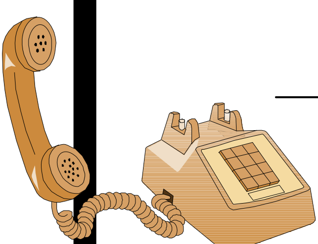
The staff of MCLE is pleased to work with people like you who are willing to offer your time and expertise to other practitioners. We strive to present the best CLE programs in Massachusetts, by addressing both timely and timeless topics, using experienced and talented attorneys at our seminars, employing high standards for our written course materials and always trying to improve upon programs that we have done before. Here is a sketch of MCLE and whom you should contact with questions, concerns or problems.

### *Program Administration*

Our programs are usually administered by a Program Attorney or the Program Manager. This person may have spoken or corresponded with you already. Most questions should be directed to one of these staff members, or their assistants:

## MCLE Contact Numbers

| | |
|---|---|
| Jonathan Small | 617-896-1244 |
| *Director of Programs* | jsmall@mcle.org |
| Allison Ladue | 617-896-x1868 |
| *Program Assistant* | aladue@mcle.org |
| Elizabeth Mooney | 617-896-1234 |
| *Program Attorney* | emooney@mcle.org |
| Jessica Bensen | 617-896-1245 |
| *Program Assistant* | jbensen@mcle.org |
| Danielle Simmons | 617-896-1243 |
| *Program Attorney* | dsimmons@mcle.org |
| Aubrey Proctor | 617-896-1312 |
| *Program Assistant* | aproctor@mcle.org |
| Jonathan White | 617-896-1238 |
| *Conference Center Manager* | jwhite@mcle.org |
| Kevin Osborne | 617-896-1257 |
| *Audiovisual Assistant* | kosborne@mcle.org |



**MCLE** **617-350-7006**
**800-966-6253**

### *Facilities*

If you have questions about our facilities or need accommodation because of a disability, contact **Jonathan White**, Conference Center Manager, at 617-896-1238.

### *Written Course Materials*

When members of the faculty submit their contributions to the course materials, the program administrator turns them over to an assistant to obtain any necessary reprint permission. Then, MCLE's production assistant organizes the materials and compiles the book. If you have questions about the production process, contact your program administrator or his or her assistant.

### *Audiovisual Equipment*

MCLE encourages the use of audiovisual equipment to enhance faculty presentations. MCLE has several options for presenting audiovisual displays, including an overhead projector, a video scanner, a slide projector, videocassette recorders and scan converters. The Audiovisual Assistant who will be assisting you on the day of the program is **Kevin Osborne**, 617-896-1257 (kosborne@mcle.org).

### *Customer Service and Registration*

The customer service department provides front-line assistance to callers and visitors to our bookstore. MCLE's Registrar is **Frank Novo**, 617-896-1230 (fnovo@mcle.org). If you would like to register someone for your program (even if you are using a complimentary ticket), call MCLE's main number: (617) 482-2205 or 800-966-6253. MCLE's bookstore can be reached at 617-350-7006 x1250.

## *Registering a Guest*

Because of our panelists' dedication to MCLE and continuing legal education, each faculty member may invite two guests to his or her seminar free of charge. This offer is limited to the MCLE program in which the panelist participates. Also, please note that not all programs (e.g., limited enrollment courses such as Roundtable Discussions and Trial Advocacy Workshops) are subject to this offer. To register guests for your program, simply contact your program administrator or customer service prior to the day of the program and provide them with the name of your program and the names and addresses of your guests. Although your guests can register at the door on the day of the program by simply filling out a registration form and stating that they are your guests, we encourage advance registration so as to avoid any confusion or misunderstanding.

*Thank you for your commitment to MCLE and we look forward to working with you.*

MASSACHUSETTS CONTINUING LEGAL EDUCATION
Ten Winter Place Boston, MA 02108
(800) 966-6253 Fax (617) 482-9498
www.mcle.org