



## PLANNING GUIDELINES FOR COSPONSORED CLE EVENTS

These guidelines are designed to assist sections and OSB CLE Seminars (“OSB CLE”) in meeting the OSB’s mission to improve the quality of legal services. In addition to providing substantive legal knowledge, this includes engaging the diversity of the Oregon bench and bar to reflect the diversity of the people of Oregon and educating attorneys about barriers to justice and the cultural richness and diversity of the clients they serve.

The information below applies to half-day (3 to 4 credit hours) or single-day CLE seminars (4.25 to 6 credit hours). Series and multi-day CLE events should be discussed with OSB CLE Seminars Manager as early as possible during the planning process. These guidelines are used for planning in-person, virtual, and hybrid (in-person and live streaming) CLE events.

### Budget and Format

- **Location:** The primary seminar venue used for in-person events is the OSB Center in Tigard. Depending upon anticipated attendance and event requirements, other venues may be utilized.
- **Formats:** In addition to in-person CLE events, a seminar may be delivered via live streaming (webcast) if the event format and venue are suitable. Typically, cosponsored CLE events are included in the OSB CLE catalog as on-demand, MP3 download, and CD products.
- **Catering:** Standard catering at a full-day seminar consists of continental breakfast and morning and afternoon refreshment breaks. Lunch is typically a separately ticketed item and is not included in the registration fee unless the section receives approval by the OSB CLE Seminars planner. Half-day seminars include either continental breakfast and a morning break or an afternoon break with refreshments.
- **Complimentary Registration:** Limited to speakers and up to six planners for a full-day seminar or four planners for a half-day seminar. Other proposed complimentary or reduced seminar registration rates should be discussed with the CLE Seminars Manager.
- **Speaker Expenses:** Up to \$500 per seminar for an all-day event or up to \$250 for a half-day event; all expenses are subject to OSB reimbursement policies. Speaker expenses are intended to cover mileage or other transportation costs, including parking at the seminar site and overnight accommodations for speakers residing more than 90 miles from the seminar site. Reimbursement for travel by air or train is standard coach or economy fare. Anticipated expenses beyond these guidelines should be discussed with the CLE Seminars Manager.
- **Speaker Fees and Gifts:** Board Bylaw 16.1 prohibits OSB CLE from giving OSB members either speaker fees or gifts beyond a “modest memento or other recognition of appreciation.” The standard appreciation gift for OSB members and volunteer non-OSB members is a \$10 Amazon gift card. OSB CLE does not pay honorariums or speaker fees for non-OSB members speaking at cosponsored events. Sections, subject to applicable board bylaws regarding the use of section funds, may provide speaker honoraria, fees, or additional thank-you gifts.
- **Seminar Fees and Expenses:** Registration rates for cosponsored seminars are set by OSB CLE to cover program expenses, including staff time. OSB CLE will collect all registration and other seminar-related fees and pay seminar expenses from these funds, including but not limited to administrative or overhead charges. Sections may use section funds for full or partial registration scholarships or otherwise subsidize the registration fee to encourage attendance. Cosponsoring sections may be eligible to receive a percentage of the net revenue, at the discretion of the CLE Seminars Manager.

## Seminar Planning

- **Seminar Content and Presenters:** Sections are responsible for developing the subject matter of the seminar, establishing the seminar agenda, inviting speakers, and timely conveying this information to OSB CLE staff. OSB CLE staff will provide section planners a production schedule with due dates. OSB CLE staff will also send speakers written confirmation informing them of the due dates for submitting course materials, marketing information, and audio/visual requirements.
- **Seminar Date:** Assigned on a first-come, first-reserved basis and subject to staff availability.
- **Start and Conclusion:** Seminars typically start between 8:30 and 9 a.m. Half-day programs are typically 3 to 4 hours long (with 5-minute transitions between each presentation) and conclude between noon and 12:30 p.m. Full-day programs are 4.25 to 6 hours long (with 5-minute transitions between each presentation).
  - **Program Break(s):** Typically there are two 10-minute breaks (morning and afternoon) during a full-day seminar; half-day seminars have one 10-minute break.
  - **Lunch Break:** The standard lunch break is 45 to 60 minutes and can be adjusted based upon seminar events, such as a lunch speaker.
- **Individual Seminar Sessions:** The minimum presentation time for CLE credit is 30 minutes. The maximum recommended time for a single presentation is 90 minutes. **For virtual events:** The platform is best suited for one or two presenters per session. *The maximum number of presenters (including a moderator) is four.*
  - **Single-speaker presentations** should fill a minimum of 30 minutes and should be allocated time based upon the topic and the presenter's level of comfort giving a virtual presentation. Those with less experience may be more comfortable with a 30-minute presentation, while a more seasoned presenter with a complex topic may need more time. *Please note that, under the MCLE rules, presentations that conclude more than five minutes earlier than the scheduled ending time will require reaccrediting the entire seminar.*
  - **Multiple-speaker presentations** should generally allow at least 20 minutes per person (e.g., a three-person panel should be allotted a minimum of 60 minutes).
- **Event Moderator:** A section member should be designated to act as the program moderator for the seminar. The moderator is responsible for introducing the presenters for each session and assisting with questions submitted online (for virtual events only).
- **CLE Accreditation:** Accreditation is based upon a 60-minute hour, e.g., 15 minutes = .25 credit, 30 minutes = .5 credit, 45 minutes = .75 credit, and 60 minutes = 1 credit. Presentation times should be allotted in these increments to facilitate accreditation.

### **Seminar Logistics:** OSB CLE Seminars is responsible for:

- **Presenter Coordination:** Sending written electronic confirmation to presenters with due dates for submitting course materials and marketing information; obtaining speaker release forms.
- **Technology:** Training the presenters on using the content delivery platform and providing viewer, presenter, and tech support during the seminar. OSB CLE staff will work directly with the speakers to provide any necessary equipment at the seminar site for in-person events.
- **Visual Aids:** Collecting and uploading the presenters' PowerPoint slides to the content delivery platform (virtual) or the CLE presenter laptop (in person). Provide any necessary equipment at the seminar site (in person).
- **Course Materials:** Collecting, collating, and electronically distributing the presenters' course materials.
- **On-Site Lunch (full-day, in-person events only):** Lunch at the seminar site is available for purchase as a convenience for attendees. Complimentary lunch is provided for speakers and planners.

**Marketing**

OSB CLE staff will prepare and disseminate all marketing materials. Electronic notices are the primary source of communication. Adequate marketing to the membership is dependent upon the timely submission by the section of seminar content and speaker information. Sections with websites are encouraged to post an electronic copy of the brochure, as well as include event notices in newsletters and other communication to section members.

To discuss services or request a CLE Registration Services Packet, please email Ms. Kes Joerg, OSB CLE Seminars Manager, at [kjoerg@osbar.org](mailto:kjoerg@osbar.org).