

Section CLE Registration Services Training

March 11, 2025

Mission

BOG Policy- Article 15 Bar Programs Section 15.1

The mission of the Bar's CLE Seminars and Legal Publications programs is to produce high quality, practical CLE Seminars, books, and resources on Oregon law in a timely manner, with a goal of ensuring a competent bar by enhancing the knowledge and skills of Oregon lawyers.

Section CLE Activities

OSB Policy 14.102 Section Continuing Legal Education Activities

- (a) The Bar is the informational clearinghouse for the CLE activities of each section. To allow the Bar to perform its role, each section must advise the Bar's CLE Seminars Program of all proposed section CLE activities at the earliest possible date.
- (b) Sections that provide CLE programs of four MCLE credit hours or more must co-sponsor such a program with the Bar's CLE Seminars Program at least once out of every three years.
- (c) Sections must use the Bar's registration services for all section CLE programs. Sections are responsible for applying and paying for Minimum Continuing Legal Education credit for seminars not co-sponsored with CLE Seminars.
- (d) A section that plans a seminar or a publication without the co-sponsorship by a bar department must indicate clearly on all publicity, printed seminar materials and publications that the seminar or publication is a section endeavor and list the name of the sponsoring section. The section may not use the Oregon State Bar logo or the phrase Oregon State Bar CLE.

OSB CLE Registration Services

- ❑ Non-cosponsored (section only sponsored event)
- ❑ Cosponsored with CLE Seminars

https://www.osbar.org/_docs/sections/CLERegServices.pdf

Planning Non-cosponsored Section Sponsored CLE Events

Section responsibilities:

- ❑ Content development
- ❑ Speaker management
- ❑ Arranging for an online delivery platform
 - ❑ The OSB Member Services Zoom account is reserved for EC meetings only
 - ❑ CLE Seminars does not have a delivery platform for sections to use outside of CLE cosponsorship
- ❑ Applying for CLE credit, paying the MCLE sponsor fee, and reporting attendance to MCLE
- ❑ Recording services for the CLE event
- ❑ Handling all seminar logistics including onsite check in at the CLE event.

CLE Events Held at a Hotel/Venue or Services Involving a Contract

- ❑ Contracts must be reviewed and executed by OSB General Counsel (send to contracts@osbar.org)
- ❑ If the CLE event is recorded, a signed speaker release form is required from each speaker before the recording is distributed
https://www.osbar.org/_docs/leadership/resources/SectionSpeakerRelease.pdf
- ❑ Signed speaker releases (send to contracts@osbar.org)
- ❑ Banquet Event Orders (BEOs) can be signed by a section contact

Timing for a Section Sponsored CLE Event

- ❑ Section contacts should reach out to CLE Seminars staff once the following information is final:
 - ❑ Title
 - ❑ Date
 - ❑ Time
 - ❑ Location
- ❑ Request a Registration Services packet from CLE staff at cle@osbar.org, a minimum of three weeks prior to the CLE event.
- ❑ After the completed Registration Services packet and event text are received, CLE staff will set up registration and promote the CLE event. It's in the section's best interest to promote the event as early as possible. It's never too early to contact CLE staff to request a packet.

Non-cosponsored - Section Revenue and Expenses

- ❑ Section sets the rates for the CLE event and receives all revenue
- ❑ Section pays all seminar expenses:
 - ❑ Venue/facility expenses: e.g., catering, audio/visual, room rental, and lodging
 - ❑ Video recording/streaming expenses
 - ❑ MCLE sponsor fee
 - ❑ CLE Seminars registration services fees:
 - ❑ Standard
 - ❑ \$10 per registrant including complimentary registrations
 - ❑ RSVP/Series
 - ❑ Tiered pricing (based upon the number of registrations per event)
 - ❑ \$150:1-99
 - ❑ \$250: 100-199
 - ❑ \$350: 200-299+

Recording Guidelines

- ❑ Sections are permitted to record and distribute CLE content to their section members and program registrants after signed speaker releases have been signed and sent to contracts@osbar.org.
- ❑ Using the program registrant list provided by CLE Seminars, sections can distribute a link to the recorded content by email. In addition, sections may utilize their list serve to distribute links to program recordings to section members. A section can post links to recorded CLE content on their website but only behind a password protected portal. MP3 (audio) and MP4 (video) links are both acceptable.
- ❑ The recorded content cannot be embedded on the section's website but can be stored in an online cloud (i.e., a Zoom account).
- ❑ The section's website coordinator is responsible for posting and removing outdated (CLE credit has expired) links from the section's website.
- ❑ Sections may purchase a Zoom account through the bar to use for meetings and events. These standard Zoom accounts allow for 300 participants but are not webinar enabled. Alternatively, sections can use a firm or personal web platform for recording CLE programs. More information about these options are available in the leadership resource materials.

CLE Seminars Responsibilities for a Non-cosponsored Event

- ❑ Sets up registration as directed on the CLE Registration Services packet.
- ❑ Promotes the CLE event as directed on the CLE Registration Services packet.
- ❑ Provides program registration materials:
 - ❑ RSVP or Series: registration list and program checklist
 - ❑ Standard: registration list, name badges, speaker name tents, electronic brochure, and electronic course materials production

Planning a Cosponsored CLE Event with CLE Seminars

CLE Seminars responsibilities:

- ❑ Determines the location for the event. The primary seminar venue for in-person events is the OSB Center.
- ❑ Presenter coordination: sends confirmations to the presenters.
- ❑ Technology: CLE staff works directly with the presenters to provide necessary equipment at the seminar site.
- ❑ Visual Aids: Collects and uploads presenter slides to the bar's virtual delivery platform and loading them on a presenter laptop for use at the seminar
- ❑ Course Materials: Collects, collates, and electronically distributes the presenters' course materials.
- ❑ Prepares and sends out an evaluation/survey to attendees.
- ❑ Catering
- ❑ Promotes the event
- ❑ Provides streaming services i.e., live webcast, video and audio recording services.
 - ❑ Places the archived recorded content (on-demand and MP3 CLE products) in the OSB CLE catalog.
- ❑ Applies for CLE credit, pays the MCLE sponsor fee, and reporting attendance to MCLE.

Planning a Cosponsored CLE Event with CLE Seminars

Section responsibilities:

- ❑ Content development
 - ❑ Providing a timed agenda to the OSB CLE Seminars planner
 - ❑ Providing names of the confirmed speakers to the OSB CLE Seminars planner

- ❑ Informing the OSB CLE planner if the section will be providing scholarships for subsidies for the CLE event.

- ❑ Providing a welcome at the CLE event and introducing the speakers.

CLE Cosponsorship - Seminar Fees and Expenses

- ❑ Registration rates are set by OSB CLE to cover program expenses.
- ❑ CLE Seminars retains all seminar revenue and pays seminar expenses from these funds.
- ❑ Cosponsoring sections may be eligible to receive a percentage of net revenue if revenue exceeds expenses.
- ❑ Sections are welcome to use their fund balance to subsidize registration rates, sponsor meal events, and/or provide scholarships.

Sponsoring CLE Events with An Outside Organization

- ❑ Sections who partner or cosponsor with an outside organization must use their section listserv to promote the CLE event.
- ❑ The OSB will not promote the event or post the event on the OSB calendar or CLE webpage.
- ❑ The CLE coordination of the event including applying and reporting CLE credit must be handled by the sponsoring organization or the section.

Online Leadership Resources

Section CLE Registration Services

https://www.osbar.org/_docs/sections/CLERegServices.pdf

CLE Section Checklist for In-Person and Hybrid Events

https://www.osbar.org/_docs/leadership/resources/InPersonandHybridEventChecklist.pdf

CLE Recording Guidelines

https://www.osbar.org/_docs/leadership/resources/SectionCLERecordingGuidelines.pdf

CLE Planning Guidelines for cosponsored events

https://www.osbar.org/_docs/sections/PlanningGuidelinesforCo-SponsoredCLEEvents.pdf

CLE Seminars Registration Services requirement

OSB Policy 14.102(c) https://www.osbar.org/_docs/rulesregs/OSBpolicies.pdf

OSB CLE Seminars Contacts

CLE Service Center
cle@osbar.org

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Shanise Martinez, smartinez@osbar.org

CLE Seminars Program and Event
Assistant
Christy Bailey, cbailey@osbar.org

CLE Seminars Program and Event
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CLE Seminars Manager

Kes Joerg, kjoerg@osbar.org

Thank you!

Questions?