

**The Florida Bar Continuing Legal Education Committee
presents**



Speaker Fever 2021

COURSE CLASSIFICATION: INTERMEDIATE

June 10, 2021

Course No. 4899

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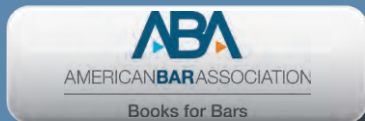
Practice Resources and Software



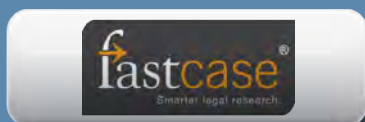
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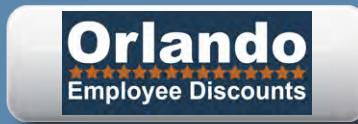
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NEW EDITION

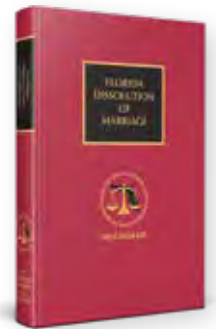
Florida Dissolution of Marriage

FOURTEENTH EDITION © 2020

This publication details the dissolution of marriage process, from interview through temporary relief, and discovery to final judgment. Key areas covered include parental responsibility, child support, alimony, equitable distribution, and attorneys' fees. In addition to updated statutes, rules, case law, and new forms and checklists, the latest edition includes:

- Discussions of updated laws: Parental Kidnapping Prevention Act, Tax Cuts and Jobs Act, and Collaborative Law Process Act
- Review of Fla. Supreme Court rulings: Full Faith and Credit, "presumption of legitimacy," fee assessments, and training, ethical conduct, and discipline of parenting coordinators
- Details about parenting plans and timesharing benefits and requirements
- Discussion about confidentiality of mediation and immunity of parenting coordinators
- Review of SNAP and reemployment regulation updates
- Review of pending appeals, particularly of alimony factual findings

\$350 | Hardbound, Pub. #22865, ISBN 9781522190233 | eISBN 9781522190240



NEW EDITION

Florida Real Property Complex Transactions

TENTH EDITION © 2020

From sales and leases of commercial property to subdivision development to mobile home park conversions, *Florida Real Property Complex Transactions* provides practical, step-by-step guidance for negotiating and drafting the necessary documents to complete these multifaceted transactions. An invaluable asset for any lawyer handling real estate transactions, the manual contains countless sample provisions and forms, along with checklists and practice pointers to ensure that all significant issues have been considered.

Highlights of the new edition include new or updated content covering:

- Drafting and negotiating purchase and sale contracts
- The sustainability of brick-and-mortar shopping centers
- Hotels, motels, restaurants, and marinas—including a new sample hotel purchase and sale agreement
- The 2019 Amendments to the Community Planning Act, expanding the ability of local governments to adopt small-scale comprehensive plan amendments
- The option to extend provision for a lease
- Ground, office, and retail leases
- Environmental issues—all-new chapter
- Issuance of the Treasury Department's and IRS's Notice 2020-23, providing real estate investors with some relief from the threat that the COVID-19 pandemic crisis has presented for real estate investors seeking to complete 1031 exchange transactions within the deadlines provided in IRC § 1031(a)(3)

\$366 | Hardbound, Pub. #22915, ISBN 9781663311757 | eISBN 9781663311764



NEW EDITION

Florida Juvenile Law and Practice

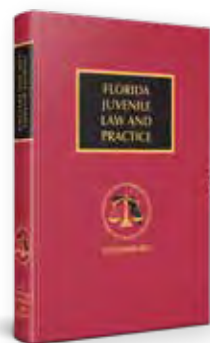
SIXTEENTH EDITION © 2020

Florida Juvenile Law and Practice provides comprehensive coverage of all areas of juvenile practice, including delinquency, dependency and termination of parental rights, and families and children in need of services. Authoritative and insightful analysis from authors that include members of the Juvenile Court Rules Committee, assistant state attorneys, assistant public defenders, attorneys representing the Department of Children and Family Services and the Department of Juvenile Justice, and private attorneys make this book an essential reference for those practicing in this area.

In addition to revised statutes, rules, and new case law, the new Sixteenth Edition features updated discussions covering:

- Adoption
- Jurisdiction
- Termination of parental rights

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Florida Commercial Law (Goldbook)

The *Goldbook* covers the relevant statutes for commercial transactions, consumer credit transactions and consumer contracts. Included are the Uniform Trade Secrets Act and the Uniform Commercial Real Estate Receivership Act, along with complementary practical analysis to help inform your transactional work in this area.

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Florida Criminal Statutes and Rules (Graybook)

The *Graybook* includes the full Crimes and Criminal Procedure & Corrections titles as well as the Rules of Criminal Procedure and related material pertaining to other crimes found throughout the Florida Statutes, with expert analysis of how the courts have interpreted Florida's criminal procedure statutes.

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Florida Real Property Law (Bluebook)

The *Bluebook* contains relevant state statutes and regulations addressing conveyances, recording, foreclosure, easements, title insurance and homeowners' associations, as well as professional qualifications of real estate brokers, sales agents, appraisers and home inspectors. Practice material covers topics such as the pandemic and real property law, protecting tenants in foreclosure, mortgage fraud and much more.

\$149 | Softbound, Pub. #20043, ISBN 9781663300300 | eISBN 9781663300317

Florida Family Law (Yellowbook)

The *Yellowbook* comprises the entire Domestic Relations Title, as well as selected statutes addressing civil practice and procedure, public health, social welfare and domestic violence. It also includes regulations of the Department of Children and Families. Practical content is provided in areas where there has been significant new case law and tax effects, including alimony, assisted reproduction and surrogacy, domestic violence injunctions, and child custody.

\$159 | Softbound, Pub. #20045, ISBN 9781663300348 | eISBN 9781663300355

Florida Civil Practice Law and Rules (Redbook)

Florida CPLR Redbook contains the Florida Civil Practice & Procedure title and the Florida Rules of Civil Procedure, as well as related sections. Helpful practice material includes more than 40 selected civil procedure forms covering different aspects of the civil trial process, from pretrial motions and discovery through appellate briefs.

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Continued on next page

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The Florida Bar acknowledges the use of the LexisNexis computerized legal research service to assist in the legal editing of its manuals and supplements. Members of The Florida Bar are eligible for special Bar member benefits. Call 866.836.8116 for more information.

Common Questions About CLER

1. What is CLER?

CLER, or Continuing Legal Education Requirement, was adopted by the Supreme Court of Florida in 1988 and requires all members of The Florida Bar to continue their legal education.

2. What is the requirement?

Over a 3 year period, each member must complete 33 hours, 5 of which are in the area of ethics, professionalism, substance abuse, or mental illness awareness, and 3 hours in technology.

3. Where may I find information on CLER?

Rule 6-10 of the Rules Regulating The Florida Bar sets out the requirement. All the rules may be found at www.floridabar.org/rules.

4. Who administers the CLER program?

Day-to-day administration is the responsibility of the Legal Specialization and Education Department of The Florida Bar. The program is directly supervised by the Board of Legal Specialization and Education (BLSE) and all policy decisions must ultimately be approved by the Board of Governors.

5. How often and by when do I need to report compliance?

Members are required to report CLE hours earned every three years. Each member is assigned a three year reporting cycle. You may find your reporting date by logging in to your member portal at member.floridabar.org.

6. Will I receive notice advising me that my reporting period is upcoming?

Four months prior to the end of your reporting cycle, you will receive a CLER Reporting Affidavit, if you still lack hours.

7. What happens if I am late or do not complete the required hours?

You run the risk of being deemed a delinquent member which prohibits you from engaging in the practice of Florida law.

8. Will I receive any other information about my reporting cycle?

Yes, you will receive reminders prior to the end of your reporting cycle, if you have not yet completed your hours.

9. Are there any exemptions from CLER?

Rule 6-10.3(c) lists all valid exemptions. They are:

- 1) Active military service
- 2) Undue hardship (upon approval by the BLSE)
- 3) Nonresident membership (see rule for details)
- 4) Full-time federal judiciary
- 5) Justices of the Supreme Court of Florida and judges of district, circuit and county courts
- 6) Inactive members of The Florida Bar

10. Other than attending approved CLE courses, how may I earn credit hours?

Credit may be earned by:

- 1) Lecturing at an approved CLE program
- 2) Serving as a workshop leader or panel member
- 3) Writing and publishing in a professional publication or journal
- 4) Teaching (graduate law or law school courses)
- 5) University attendance (graduate law or law school courses)

11. How do I submit various activities for credit evaluation?

Applications for credit may be found on our website, www.floridabar.org.

12. How are attendance hours posted on my CLER record?

You must post your credits online by logging in to your member portal at member.floridabar.org.

13. How long does it take for hours to be posted to my CLER record?

When you post your CLE credit online, your record will be automatically updated and you will be able to see your current CLE hours and reporting period.

14. How may I find information on programs sponsored by The Florida Bar?

You may wish to visit our website, www.floridabar.org/cle, or refer to The Florida Bar News. You may also call CLE Registrations at 850/561-5831.

15. If I accumulate more than 30 hours, may I use the excess for my next reporting cycle?

Excess hours may not be carried forward. The standing policies of the BLSE, as approved by the Supreme Court of Florida specifically state in 6.03(b):

- ... CLER credit may not be counted for more than one reporting period and may not be carried forward to subsequent reporting periods.

16. Will out-of-state CLE hours count toward CLER?

Courses approved by other state bars are generally acceptable for use toward satisfying CLER.

17. If I have questions, whom do I call?

You may call the Legal Specialization and Education Department of The Florida Bar at 850/561-5842.

**While online checking your CLER, don't forget to check your
Basic Skills Course Requirement status.**

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PREFACE

The course materials in this booklet were prepared for use by the registrants attending our Continuing Legal Education course during the lectures and later in their offices.

The Florida Bar is indebted to the members of the Steering Committee, the lecturers and authors for their donations of time and talent, but does not have an official view of their work products.

CLER CREDIT

(Maximum 2.0 hours)

General 2.0 hours Technology 2.0 hours

Seminar credit may be applied to satisfy both CLER and Board Certification requirements in the amounts specified above, not to exceed the maximum credit. Refer to Chapter 6, Rules Regulating The Florida Bar, see the CLE link at www.floridabar.org for more information about the CLER and Certification Requirements.

Prior to your CLER reporting date you will be sent a Reporting Affidavit (must be returned by your CLER reporting date). You are encouraged to maintain records of your CLE hours.

CLE CREDIT IS NOT AWARDED FOR THE PURCHASE OF THE COURSE BOOK ONLY.

CLE COMMITTEE MISSION STATEMENT

The mission of the Continuing Legal Education Committee is to assist the members of The Florida Bar in their continuing legal education and to facilitate the production and delivery of quality CLE programs and publications for the benefit of Bar members in coordination with the Sections, Committees and Staff of The Florida Bar and others who participate in the CLE process.

COURSE CLASSIFICATION

The Steering Committee for this course has determined its content to be INTERMEDIATE.

CLE COMMITTEE

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Douglas Avery Greenbaum — Vice Chair
Susan Odzer Hugentugler — Vice Chair

FACULTY & STEERING COMMITTEE

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Hon. Thomas N. Palermo, Tampa
Lisa Tipton, Searcy, AZ
Kim Torres, Melbourne
Tania Williams, Ft. Lauderdale
Julie Wilmer, Austin, TX

CLE COMMITTEE

Patricia Dawson, Tampa — Chair
Terry L. Hill — Director, Programs Division

For a complete list of Member Services visit our web site at www.floridabar.org.

LECTURE PROGRAM

2:00 p.m. - 2:05 p.m.

Welcome

Patricia Dawson, Tampa

2:05 p.m. - 2:55 p.m.

The Production: Best Practices in Creating, Preparing, and Presenting Great Florida Bar CLE

H. Scott Fingerhut, Miami

Rebecca Bandy, Tallahassee

Terry Hill, Tallahassee

Jonathon Israel, Tallahassee

Hon. Thomas N. Palermo, Tampa

Kim Torres, Melbourne

2:55 p.m. - 3:05 p.m.

Break

3:05 p.m. - 3:55 p.m.

Not Your Parents' Classroom: Best Practices in Employing Technology to Maximize the Impact of Your Florida Bar CLE

Tania Williams, Ft. Lauderdale

Sam Dickenson, Austin, TX

Christy Foley, Sanford

Ashley Gantt, Miami

Brandon Haynie, Austin, TX

Jani Maurer, Ft. Lauderdale

3:55 p.m. - 4:05 p.m.

Break

4:05 p.m. - 4:55 p.m.

Always Be Closing: Best Practices in Marketing Great Florida Bar CLE

Lisa Tipton, Searcy, AZ

Daniel Aller, Tallahassee

Jennifer Dorminy, Tallahassee

Anthony Musto, Miami Gardens

Julie Wilmer, Austin, TX

Jennifer Krell Davis, Tallahassee

4:55 p.m. - 5:00 p.m.

Closing Remarks

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Rebecca Bandy, Tallahassee
Terry Hill, Tallahassee
Jonathon Israel, Tallahassee
Hon. Thomas N. Palermo, Tampa
Kim Torres, Melbourne

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Tania Williams, Ft. Lauderdale
Sam Dickenson, Austin, TX
Christy Foley, Sanford
Ashley Gantt, Miami
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Jani Maurer, Ft. Lauderdale

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Lisa Tipton, Searcy, AZ

Daniel Aller, Tallahassee

Jennifer Dorminy, Tallahassee

Anthony Musto, Miami Gardens

Julie Wilmer, Austin, TX

Jennifer Krell Davis, Tallahassee

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AUTHORS/LECTURERS

REBECCA J. BANDY serves as the Director of The Florida Bar's Henry Latimer Center for Professionalism. She joined the Center as Assistant Director in March 2017. Prior to joining The Florida Bar, Ms. Bandy was an associate attorney at the Law Offices of Thomas L. Powell, PA in Tallahassee, where she litigated in the areas of family and criminal law. She most recently taught college level courses at Lawton Chiles High School, where she helped establish the school's award-winning mock trial team along with The Honorable Mark Walker, The Honorable David Frank, and attorney David Grimes. Ms. Bandy previously served as the Director of Alumni Relations at the Florida State University College of Business and as the Assistant Director of Alumni and Development at the Florida State University College of Law. She earned her Juris Doctor from the Florida State University College of Law. A native of the tiny town of Hilliard in Nassau County, Florida, she earned her Bachelor's in Communications with Honors from Jacksonville University and her teaching credentials at Georgia Southern University. Since becoming director, Ms. Bandy has attended the National Legal Mentoring Symposium in Columbia, South Carolina; the Search Inside Yourself Leadership Institute at Georgetown University; the National Mindfulness Summit in Washington, DC; resilience training at Johnson and Johnson's Human Performance Institute; and has received a Mental Health First Aid certificate. She currently serves on the American Bar Association's Standing Committee on Professionalism. She regularly speaks to legal professionals, law school students, and Florida Bar staff on general professionalism, mindfulness-based emotional intelligence, the impacts of loneliness, mentoring, networking, gratitude, resilience, interpersonal communications skills, active listening, implicit bias, and team building. She is the 2021 recipient of the Champion of Professionalism Award given by the Office of Criminal Conflict and Civil Regional Counsel, 2nd District Court of Appeal. Ms. Bandy is active in her church, is a community volunteer at an area elementary school, and she has supported causes including the March of Dimes, Epilepsy Association of the Big Bend, the Holocaust Education Resource Council (HERC), the Kearney Center, and Honor Flight Tallahassee.

GERALD B. COPE, JR is a partner in Akerman LLP, and Chair of its Appellate Practice. Mr. Cope was a Judge of Florida's Third District Court of Appeal for 22 years, including service as Chief Judge. He represents clients in appeals, conducts practice oral arguments for attorneys appearing in appellate courts, serves as a consultant on appeals, and provides support to trial counsel. He serves as an arbitrator, special master, and mediator. Mr. Cope received a B.A. from Yale University, a J.D. from the Florida State University College of Law, where he served as Editor-in-Chief of the law review, and an LL.M. from the University of Virginia School of Law.

JENNIFER KRELL DAVIS joined The Florida Bar Public Information Office in 2001 to assist with special projects and there began her career in communications and public relations, after graduating law school and working as a staff attorney for the Florida House of Representatives. She moved on to the Florida Chamber of Commerce as Communications Director where she led messaging efforts for legislative advocacy, and political and grassroots outreach. From there she became Communications Director for the Florida Department of State, covering the arts, corporation, and historical divisions as well as the 2008 Presidential Election. After that she served as Press Secretary for then Attorney General Pam Bondi and then Vice President of Public Affairs for the Florida Ports Council, the professional association for Florida's 15 public seaports. She rejoined The Florida Bar staff in 2016 as Deputy Director of Communications leading internal and external digital communications for the Bar, including supervising website, social media, and email communications. She has also served as budget coordinator, committee staff and general communications assistance wherever needed around the Bar. She became interim

Communications Director in 2021. Davis received her undergraduate degree in English Literature from Florida State University and her law degree from the University of Florida.

H. SCOTT FINGERHUT is a three-time Professor of the Year and two-time Pioneer Award winner at FIU College of Law in Miami, where he teaches Trial Advocacy, Criminal and Civil Pretrial Practice, Criminal Procedure, and coaches the Trial Team and is now in his 33rd year as a trial lawyer and 22nd year of full-time law teaching,. By Dean’s appointment, Professor Fingerhut is also a Fellow of The Honors College at FIU and Pre-Law Faculty Advisor, teaching the two-part upper-level seminar *Observing Ourselves*: in fall, YOUiversity: A Legal Primer for Life After Honors, and in spring, The Gathering: *Great Discussions About Contemporary Law in My America*. In court, Professor Fingerhut devotes himself to criminal defense and the defense of applicants seeking admission before the Florida Board of Bar Examiners and lawyers facing Florida Bar discipline. Rated *AV Preeminent* by Martindale-Hubbell, Professor Fingerhut is consistently ranked among the region’s top criminal defense lawyers, including *The Best Lawyers in America*. Beyond campus and the courthouse, Professor Fingerhut is a Florida Bar leader, earning the unique distinction to twice serve as chair of The Florida Bar Criminal Procedure Rules Committee, and also serving as chair of the Criminal Law Section of the Bar. Currently, Professor Fingerhut is a member of The Bar’s Professional Ethics Committee, the Code & Rules of Evidence Committee, the Criminal Law Section Executive Council, and serves as the Criminal Law Section CLE chair. Professor Fingerhut is also appointed to a State of Florida Eleventh Judicial Circuit Professionalism Panel. And most recently he has been selected to serve as a subject matter expert on the revision of the Florida Bar examination for the Florida Board of Bar Examiners’ Practice Analysis Panel. Professor Fingerhut has chaired the Dade County Bar Association Criminal Law Committee, served as president of the Florida Association of Criminal Defense Lawyers-Miami Chapter (FACDL-Miami), and was the Dade County Bar Designee to the Miami-Dade County Mayor’s Mental Health Task Force. He has also served as a member of The Florida Bar Committee to Study the Decline in Jury Trials, The Bar’s Committee on Student Education and Admission to the Bar, The Florida Supreme Court Criminal Court Steering Committee Workgroup on Post-Conviction Relief, the Editorial Board of *The Florida Bar Journal* and *Florida Bar News*, and, by appointment of the Chief Justice of the Florida Supreme Court, the Florida Innocence Commission. A frequent writer, lecturer, and legal commentator on ethics, liberty, and justice matters, Professor Fingerhut’s co-authored chapter, “Conflicts of Interest and Other Pitfalls for the Expert Witness,” has been twice published in Springer Publishing’s *Handbook of Forensic Neuropsychology*. Released in 2016 from LexisNexis is Professor Fingerhut’s Practice Guide, *Florida DUI Law*, which he co-authors with the extraordinary Robert S. Reiff. And most recently, Professor Fingerhut is being invited to speak with lawyers across Florida – including the federal judiciary of the Eleventh Circuit -- on the need for our profession to “Take Back Truth in an Age of ‘Literal Truthiness.’” Professor Fingerhut received his undergraduate degree in American Government and Music from the University of Virginia in Charlottesville, and his law degree from Emory University in Atlanta, where he was a Moot Court Team member, softball captain, and proudly hosted the Law Follies. Before entering private practice, Professor Fingerhut served as a prosecutor in Janet Reno’s Miami-Dade County State Attorney’s Office. He is the recipient of the “Put Something Back” *Pro Bono* Award from the Dade County Bar, the Daniel S. Pearson-Harry W. Prebish Founders Award from FACDL-Miami, and the Steven M. Goldstein Criminal Justice Award from FACDL Statewide. Six times Professor Fingerhut has been selected by the FIU College of Law graduating class to hood them at Commencement. And in 2019, the graduates chose him to deliver the inaugural “Last Lecture.”

CHRISTY L. FOLEY is an attorney, mediator, and arbitrator who is based in Central Florida. She is licensed to practice law in both New York and Florida. Ms. Foley manages an

entertainment and small business law firm called The Law Office of Christy L. Foley. She also manages a dispute resolution firm called E-Mediation Services. Ms. Foley has served as the Chairwoman of Florida's Mediator Ethics Advisory Committee ("MEAC") since 2018. She also serves as an officer in both the Alternative Dispute Resolution Section and the Entertainment & Sports Law Section of The Florida Bar. Ms. Foley teaches ADR at the University of Central Florida, where she serves as a visiting lecturer. Plus, she has given presentations on mediation ethics and techniques (particularly e-mediation techniques) throughout Florida. Additionally, she has hosted multiple nationwide webinars on the topic of e-mediation and social media influencer law. She is a sought-after speaker whose passion shines through in all of her presentations and who manages to engage large audiences in her speeches.

ANDY GROSMIRE is the Chief of Enforcement with the Office of Financial Regulation for the State of Florida and a permanent deacon in the Catholic Church serving the diocese of Pensacola-Tallahassee.

KATE GROSMIRE is a Business Analyst with the Florida Department of Environmental Protection and is the author of "Forgiving My Daughter's Killer: A true story of Loss, Faith, and Unexpected Grace."

TERRY HILL is the Division Director of the Programs Division at The Florida Bar where he leads a team of five department heads and 60 staff members. He oversees annual operating budgets for the Programs Division of approximately \$10 million. The Florida Bar is a unified Bar with more than 108,000 members. Mr. Hill provides leadership and oversight for Legal Publications; Legal Specialization & Education/MCLE Course Approval; Professional Development/Continuing Legal Education; Meetings & Conventions; and The Practice Resource Institute/Lawyer Referral Service. He also serves as the Director of CLE and The Florida Bar Member Benefits Program. Mr. Hill has been a member of the National Association of Bar Executives (NABE) for 12 years where he currently serves as NABE President and has served on the NABE Board of Directors as President-elect, Vice President, and a NABE State Bar Director. He also serves as an active member of the NABE Sponsorship Committee. Mr. Hill previously served on the NABE Professional Development Committee and NABE Membership Committee. He is also a member of the NABE Administration & Finance and NABE Communications Sections. He has served as a committee chair, vice chair, and member of NABE committees. He has served as a presenter/panelist at NABE meetings. Mr. Hill is a member of the Association for Continuing Legal Education Administrators (ACLEA) and has served as a member of an ACLEA Programming Committee, Nominating Committee and as a presenter/panelist at ACLEA meetings. In 2013, Mr. Hill was named to the Fastcase 50 which highlights entrepreneurs, innovators, and trailblazers who have charted a new course for the delivery of legal services. Mr. Hill serves on the Florida State University College of Law Alumni Board of Directors where he currently serves as the Immediate Past President. He previously served as the Chair of the FSU College of Law Student Recruitment Committee. He previously served on the FSU Family Connection Advisory Board as Chair of the Development Committee. Prior to attending law school at Florida State University College of Law and joining The Florida Bar, Mr. Hill worked as a Management Representative and Quality Coordinator in the manufacturing industry and served in the U.S. Navy in Pearl Harbor and San Diego. He is an honorably discharged Navy veteran who served during the Persian Gulf War during the Operation Southern Watch – Cease Fire Campaign where he was awarded the Navy Achievement Medal.

JONATHON ISRAEL is the Director of the Practice Resource Center of The Florida Bar in Tallahassee, Florida where he provides law practice management and legal technology consulting to members of The Florida Bar. He is a member of the ABA Law Practice Division where he serves on the Legal Technology Resource Center Board. Jonathon has been with The Florida Bar for over nineteen years. Jonathon began his career in The Florida Bar's Information Technology Department. As long-time IT Operations Manager for The Florida Bar's IT department, Jonathon brings a strong technology background to the Practice Resource Center.

PROFESSOR JANI E. MAURER joined the full-time faculty of the Shepard Broad College of Law at Nova Southeastern University in 1987. Her teaching responsibilities include the first year Legal Research and Writing (formerly Lawyering Skills and Values) course. Upper class courses taught by Professor Maurer include Income Tax, Wills & Trusts, Probate Workshop and Judicial Administration. Professor Maurer previously served as Acting Director of the Lawyering Skills and Values Program. For the past thirty years, she has been a Director and Law School Liaison for the Craig S. Barnard Inn of Court in Palm Beach County, Florida. In addition to coaching the tax moot court team during the 2016-17 academic year, the Professor represents the law school on The Florida Bar Continuing Legal Education Committee, and as a member and prior Chair of a Florida Bar Grievance Committee in Palm Beach County. The Professor is a co-author of Florida Wills, Trusts, and Estates – Cases and Materials, currently available in its 4th edition from Carolina Academic Press, and of the three prior editions, and author of several articles.

JULIE MCBRIDE has been teaching the joys of art for a number of years to children and college students in the Tallahassee community as an Elementary Art Instructor, and now as an Adjunct Professor.

MICHAEL MCBRIDE is a Senior Database Administrator contracted with the Florida Department of Transportation.

ANTHONY C. MUSTO practices in Hallandale Beach, FL. He is also an Adjunct Professor of Law at St. Thomas University, where he taught on a full-time basis for 11 years. He is a long-time member of The Florida Bar CLE Committee and a frequent speaker at and organizer of CLE programs. He is board certified by The Florida Bar in both appellate practice and juvenile law. Prof. Musto is a Fellow of both the American Bar Foundation and The Florida Bar Foundation, a member of the ABA Senior Lawyer Division Council, and a Co-Executive Director of the ABA Criminal Justice Section Specialized Practice Division. He has previously served as the President of Florida Legal Services, Inc., a member of the Board of Directors of The Florida Bar Foundation, and a member of the ABA Commission on Youth at Risk, Standing Committee on Professionalism, and Criminal Justice Section Council. He has also been a member of the Supreme Court of Florida Commission on Professionalism and Committee on Standard Jury Instructions in Criminal Cases. He is a past-chair of the Appellate Practice, Criminal Law, Government Lawyer and Public Interest Law Sections of The Florida Bar, the Bar's Council of Sections, Criminal Procedure Rules Committee and Rules of Judicial Administration Committee. Among the honors Prof. Musto has received are The Florida Supreme Court Tobias Simon Pro Bono Service Award; The Florida Bar Claude Pepper Outstanding Government Lawyer Award; The ABA GPSolo Division Making a Difference Through Pro Bono Award; The Florida Bar Public Interest Law Section John J. Copelan, Jr., Public Interest Award; The Florida Bar Appellate Practice Section James C. Adkins Award, The Florida Bar Appellate Practice Section John R. Hamilton Pro Bono Award; The Florida Statewide Guardian ad Litem Program Children's Champion Award; and the Florida Association of County Attorneys President's Award. Mr. Musto's civic involvement includes service as a city commissioner in Hallandale

Beach, chair of Hallandale Beach's Charter Review, Community Relations and Ad Hoc Parking Committees, and President of the Hallandale Symphonic Pops Orchestra.

THOMAS N. PALERMO serves as a Circuit Court Judge in the Thirteenth Judicial Circuit in and for Hillsborough County, Florida. He was appointed to the bench in 2019. In March, he received the HCBA's Robert Patton Outstanding Jurist Award for 2020. Judge Palermo served for 12 years as a federal prosecutor. In that capacity, he worked on cases involving murder, traditional organized crime, terrorism, transnational organized crime, complex frauds, public corruption, gangs, and narcotics distribution. Over the course of his career, he also served as Senior Litigation Counsel, the District Opioid Coordinator, a Reviewer, the Human Trafficking Task Force Coordinator, and the District Mortgage Fraud Coordinator. Over the course of that career, he was recognized numerous times for his service to the United States, including by the United States Army, Coast Guard, the FBI, NASA, the Defense Criminal Investigative Service, the U.S. Department of Health and Human Services, U.S. Postal Service, DEA, the National Science Foundation, the VA, the Department of Homeland Security, U.S. Department of Labor, the Hillsborough County Sheriff's Office, the Tampa Region Financial Crimes and Inspectors General Council, and the Council of Inspectors General on Integrity and Efficiency. Before serving at the Department of Justice, he served as an assistant state attorney for 3 ½ years in Tampa, where he left as the Deputy Chief of the Economic Crime Unit, and, before that, as a federal judicial law clerk. Judge Palermo graduated with his B.A. from American University in 1998, with his J.D. from the Florida State University College of Law in 2001, and with his LL.M. in Banking & Finance from King's College London in 2002.

KIM TORRES has enjoyed a full time mediation practice for over 20 years. Her focus is on working with individuals, small businesses and family members in high conflict matters. Kim has developed an expertise with pro se divorces, consumer debt and in working with adult children of elders. Most recently, Kim served as the Chair of the Alternative Dispute Resolution Section of The Florida Bar and is working to develop a program for the mediation of criminal matters in the 18th Circuit. Kim is active in the leadership of non-profit and professional organizations, including the Jr. League of South Brevard, the CLE committee of the Florida Bar, and the 18th Circuit Professionalism Panel.

TANIA WILLIAMS is the Director of Merit Retention, Recruitment and Training for the Broward County State Attorney's Office. Tania is responsible for identifying and filling the attorney staffing needs for the office. She manages and facilitates the initial phases of the interview and hiring process for Assistant State Attorneys. Tania also designs and implements employee retention strategies for the office. Tania also serves as the chief training officer for the State Attorney's Office. Tania is also the Founder and Executive Director of The Skilled Advocate Company. The mission of the Skilled Advocate Company is to help lawyers become better advocates one skill at a time. The Skilled Advocate Company provides virtual advocacy training workshops and online courses for lawyers who are new to practice or new to litigation. Tania has been an attorney for 18 years. She is a former NITA faculty member and is a new faculty member for the Advanced Trial Advocacy Seminar sponsored by the Trial Lawyers Section of The Florida Bar.

JULIE WILMER is the Director of Client Services at InReach Continuing Education, working with CE professionals to set up, design, and market engaging and effective online learning experiences. Julie comes from a background of education and small business success. Julie spent part of her career helping small businesses thrive -both through effective business planning and

marketing. As a certified teacher in the state of TX, Julie also has a wealth of experience crafting dynamic educational programming. Julie holds a Bachelor of Arts degree from Gettysburg College.

**THE PRODUCTION: BEST
PRACTICES IN CREATING,
PREPARING, AND PRESENTING
GREAT FLORIDA BAR CLE**

By

**H. Scott Fingerhut, Miami
Rebecca Bandy, Tallahassee
Terry Hill, Tallahassee
Jonathon Israel, Tallahassee
Hon. Thomas N. Palermo, Tampa
Kim Torres, Melbourne**

SPEAKER FEVER 2021

THE PRODUCTION:
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and The Florida Bar
Continuing Legal Education Committee
Patricia Dawson, Chair

~ ~ ~

at the
2021 Annual Florida Bar Convention

~ ~ ~ ~

BIG PICTURES

1. Why We Are Here

What makes great Florida Bar CLE great?

2. The Key Players

How to ensure great Florida Bar CLE

3. Getting Started

From course creation to initial advertisement

4. Seeing It Through

From advertisement to the event, and beyond

5. The CLEmandments

The experts' CLE rules of the road

SUPPORTING MATERIALS

From Terry L. Hill

1. Be cognizant of the timeline leading up to the program. Allow time for marketing and promotion.
2. Be intentional in the title or naming of the overall seminar and the individual topics. The program is likely to have broader appeal outside just your section if others easily understand what the program is about.
3. Remind speakers, presenters, and panelists that the most people who will ever watch their program are not even in the room. Likely 70% of the registrants will be webcast, online, or downloadable registrants.
4. Embrace half-day and 60, 90, and 120 minute CLE programming. Many lawyers appreciate bitesize CLE programming where they do not have to give up or commit to an entire day.
5. Consider partnering with another Bar section on overlapping or broad topics. Provides broader reach of potential registrants.
6. Ask seminar faculty members to share the information and registration link for the seminar with their colleagues and on their social media.
7. When planning annual programs, mix up the topics and speakers. Otherwise you may lose potential registrants who look at the program and speaker list and think I heard this same program last year.
8. Promote future or past section programming during the seminar breaks and to the registrants post-seminar.

9. Technical issues are going to happen, but try to minimize the likelihood of tech issues by having everyone test the equipment and software being used prior to the event. I recommend having a Plan B ready,

10. Think about the registrant's experience when planning the timing and placement of sessions within a program as well as start and end times.

From the Hon. Thomas N. Palermo

1. Be Prepared – putting together a good CLE takes an exceptional amount of preparation. The purpose of a CLE is—at its core—to provide the attendee with the information they need, not necessarily whatever it is you want to teach. You have to understand the target audience. Once you do, you have to formulate learning objectives; plan out the topic (e.g., preparing for and participating in delinquency detention hearings); come up with a form for the program (e.g., a mix of pre-recorded video and live panelists); prepare any materials; and think through how things will go wrong to prepare solutions. You need to secure appropriate speakers (this can include factors like substantive knowledge, charisma, ability to teach, diversity, and the wow factor), make sure the course content and material is right and ready. You need to give yourself adequate time to test and practice. And, you need to budget for (money or time) any of the pre-production and support resources you are going to use. Don't be afraid of things like needs surveys or asking people what they need; don't assume you know without at least doing some research. You need to figure out what technical capabilities you will have access to during the program and what you can deploy to succeed in the program. Also, work in advance to get CLE and/or CJE credit approval (CJE brings in more judges! and, if possible, specialized credit approval (e.g., technology or a higher level of credit) wherever possible to maximize the value for your learners. And you need to be able to prune and cut back and control the content, always remembering your learning objectives. That is how you develop good, substantive content that is actually needed and come up with good, clever, creative ways to share it. Preparation is like location in real estate. The key is preparation, preparation, preparation.

2. Be Professional – being the ring master of the circus requires you to always be calm, cool, and collected. Things will go wrong. You don't want offensive content in your program, beyond that which is absolutely necessary. If you are going to succeed in your learning objectives, you have to make sure that you don't do things that will cause the target audience to tune you out. You can cover hard, challenging, emotional, and even offensive topics but you have to handle them with grace and care. Don't fall back on war stories or silly skits unless it is actually helping you meet the learning objectives. You also have to learn how to manage the audience, how to incorporate them into the program, to engage them. You are never the star of the show and these programs are not supposed to be about highlighting how great any one person is. The quiet professional is engaged in accomplishing the mission, not

tooting his or her own horn beyond what is necessary to establish why the audience should care what a presenter is saying. People will love your work—and by extension, probably you—if you are putting out high quality material that meets their needs. That’s the hallmark of a real professional and when we are at our best when putting on CLEs.

3. Be Prompt – start on time. End on time. Never go over. Be early. Our target audience in the legal community is generally bright, competitive, engaged, and very educated. Respect them and their time. Respect your own. When you set planning meetings, be on time. Leave on time. Take opportunities to bond and grow with your team putting the program on but, at the same time, remember that everyone has lives and is doing heavy lifting and usually without pay. This is a lot of work and, being late, being unprepared, looking sloppy and unprofessional, those things hurt. Being on time makes a real difference.

4. Be On Target – the mission is to achieve your identified learning objectives. No matter how clever the idea or fun the format, if it doesn’t achieve it, drop it. You have a clear objective, a target: delivering the high quality program that meets your target audience’s needs. Everything has to be weighed against it. When you feel drift or mission creep set in, stop it. Don’t be tempted to try to do everything in a program or get distracted by the shiny object or squirrel. A good CLE takes focus. But, there is a time when this can change: audience participation. Remember that the goal isn’t necessarily to cover all the material you planned. It isn’t about you. If you are, for example, live and the audience really gets interested in an aspect of the presentation, you have to be able to pivot and meet the needs at the time. You can’t let the program get hijacked by an outlier in the audience but there are going to be times where something you planned organically develops into a substantive conversation focused in one on piece of what you wanted to cover. You are still on target when you help your audience achieve what they needed to know even when you don’t get through all your pre-planned materials. You will achieve success by staying on target while preparing and also during the program itself even if you don’t end up covering every single thing you wanted to cover as long as you met the needs of the people who were there to learn.

5. Maximize Return On Your Investment – putting on a good CLE is a lot of work. Think about what you can do to maximize the return on your investment. For example, if you are doing a live CLE for the FLA Bar, live on Zoom, make sure it is recorded so that it can be shared again at times convenient for other learners or accessible to other people. Part of the sequence filmed for the pre-recorded segment I put together for one of my CLEs was recycled into our Court’s new “welcome to jury service” video. And, the delinquency program I did is slated to be part 1 of a series or deeper, larger programs. It’s another way you can take all of your hard work on a program and turn it into not just success on the day of your program but success down the road in other programs and other places. Don’t just think about the day of the program, if you want your investment to pay dividends. As a final note, follow up with the people involved in the CLE afterwards. Say thank you. In the long term, much professional success is built on relationships and doing high quality work. You will maximize your personal ROI by remember to thank you people, especially your volunteers. Plus it’s just being a nice human.

6. Be Accountable – don’t be vague. Set clear deadlines. Set clear expectations. Meet or exceed them yourself. And be accountable. Running anything—including CLEs—takes leadership. There is a value in being accountable for tasks, commitments, timeliness. It is part of leadership and will help you lead a good team to successfully put on an excellent CLE.

7. Be Adaptable – things will always go wrong. Be like the USMC: improvise, adapt, overcome. When you are running a CLE program, don’t be afraid to be intervene, to be the one to run up and swap out the broken wireless mic for the one that works. You take ownership and pivot where you need to pivot. If a speaker doesn’t show up or the laptop dies, you pivot. You want to have a good plan and be prepared but you also can’t be afraid to throw the plan out improvise.

8. Lessons Learned – after your CLE is over, do a lessons learned. Take notes for yourself. What worked? What didn’t? What can you do better next time? You think you will remember everything but you are always going to forget. Leave yourself some time and space to remember and learn. It will help you knock the next one out of the park.

9. Be Self-Aware – all of us make certain natural assumptions when we put programs together. Do your best to be self-aware. Figure out what your assumptions are. If you are doing a PPT, share it with a couple colleagues and ask them to scrub them, spot any errors, omissions, or style edits. Here is an example: I'm colorblind so my PPTs normally have a black background with white writing. I have trouble seeing PPTs with certain color pairings (e.g., blue and orange, red and green, etc.). So, when I scrub other people's programs I suggest to them addressing those kinds of changes because, although they can see color, there are other people like me who can't. There are going to be other things you will assume and sometimes you will be wrong. Better to catch that stuff before the program than after it is over.

10. Learn From Others – next time you watch a CLE, watch it not just for the content but also for what you can learn from how they did it. What did you like? What did you hate? What you can use for yourself? If you get into teaching, every program you attend will be an opportunity for you to learn, not just about the substance of the program but you can avoid mistakes or do better. And, while you are it, reach and say something nice to the people who put them on, if they deserve it. It's usually a thankless effort. Excellence often begets more thankless work. Let's change that and make sure people are appreciated for good work. It will help improve CLEs when you are telling people who are doing them what you liked that they did so that they can do more of it or others can learn what they can do that you found excellent.

From Kim W. Torres

GOALS - Why do we want to do a presentation?
- Revenue/Education/Exposure/Member Expectations

1. **TIMING** - When is the best time to present?
 - Current Events - pandemic
 - Preparation period
 - Promotion Available: Florida Bar deadlines
 - Point Person to prod and watch deadlines

2. **TOPICS:** What do people want to learn or hear?
 - Educational : broad v. expert level of discussion
 - Required credits
 - Immediate Demand - virtual options
 - Audience: consumer or practitioner (how-to)

3. **FORMAT** - Best way to present?
 - Live or virtual - location
 - 1.0 hrs or half/whole day presentation
 - Goal: interaction vs. pushing information
 - Panel vs. one/two experts

4. **PARTICIPANTS** - Who should present?
 - Expertise and Experience
 - Celebrities and Established Reputation
 - Political/Networking advantages
 - Number of Participants
 - Reminders, Tasks and Confirmations

5. **PREPARATION and FOLLOW UP**
 - Promotion - best way to reach audience
 - Organizational meetings: assign topics and format to participants
 - Technology run-through
 - Power Point and Hard copies
 - Feedback: Surveys
 - Cataloging courses: Name, Location, Heading
 - Shaping your program to maximize goals - follow CLE accreditation guidelines

6. **PAYING ATTENTION TO DETAILS - What could go wrong?**
 - Lighting/sound
 - Parking/ Room temperature
 - Food
 - Afford ability and Accessibility
 - Introductions
 - Tech support
 - Forms available for feedback and CLE credits
 - Follow up timely, if promised
 - Costs - rental, food, AV equipment, advertising, fees

SAMPLE FLORIDA BAR SECTION CLE FORMS

Exhibit 1

Seminar Timeline

Sample taken from a Criminal Law Section CLE scheduled for
September 3, 2021

Exhibit 2

CLE Preparation Check List

Exhibit 3

Program Chair Course Development Worksheet

Exhibit 4

Program Chair Worksheet – Audio Webcast

Exhibit 5

Master (Annual) CLE Programming Spreadsheet

EXHIBIT 1

1234 The Best CLE Ever! Seminar Timeline

Course Date: City: Sponsor/Section:

September 03, 2021 Orlando Criminal Law Section

April 16, 2021	140 days (20 weeks)	<ul style="list-style-type: none"> • Appointment of steering committee chair and quality coordinator by CLE chair
May 14, 2021	112 days (16 weeks)	<ul style="list-style-type: none"> • Appointment of steering committee • Initial meeting of steering committee; selection of topics; selection of speakers; dates selected (if not already done); letter sent to speakers advising requirements of and deadline for written materials; staff letter to program chair reminding of deadline for receipt of course detail information
June 11, 2021	84 days (12 weeks)	<ul style="list-style-type: none"> • Course detail information due to staff • Confirmation letters sent to speakers • CLE credit application submitted • Save the date posted on section site and link established • Informz email campaign set up • PAdmin - Start CLE Course Development worksheet
June 12, 2021	83 days	<ul style="list-style-type: none"> • PAdmin - Request account setup in general ledger
June 13, 2021	82 days	<ul style="list-style-type: none"> • F&A - Confirm/Assign account codes
June 14, 2021	81 days	<ul style="list-style-type: none"> • PAdmin - Forward venue info to Meetings Dept.
June 19, 2021	76 days	<ul style="list-style-type: none"> • Meetings Dept. - Complete venue contract
June 20, 2021	75 days	<ul style="list-style-type: none"> • PAdmin - Request CLE accreditation
June 21, 2021	74 days	<ul style="list-style-type: none"> • LSE - Provide CLE accreditation
June 22, 2021	73 days	<ul style="list-style-type: none"> • PAdmin - Schedule Bar News ads (pink sheet)
June 23, 2021	72 days	<ul style="list-style-type: none"> • PAdmin - Submit ZenDesk work request to OS to create Bar News ad
June 24, 2021	71 days	<ul style="list-style-type: none"> • OS - Accept work request to create Bar News ad
June 25, 2021	70 days (10 weeks)	<ul style="list-style-type: none"> • Cancel if course detail not completed • Proofed ad for Bar News completed • Send letter with course material deadline reminder and course detail to speakers • Authors send course materials to Quality Coordinator/Program Chair • PAdmin - Complete and approve course fees worksheet
June 29, 2021	66 days	<ul style="list-style-type: none"> • PAdmin - Complete CLE Course Development worksheet and submit to MemberNation CLE setup coordinator
July 02, 2021	63 days (9 weeks)	<ul style="list-style-type: none"> • PDCoordinator - Complete event setup in Salesforce, complete initial review and submit to QA • PAdmin - Update Informz campaign with link
July 09, 2021	56 days (8 weeks)	<ul style="list-style-type: none"> • Eblast promotion • First ad in Bar News • Completed course materials due to staff, in final form • Event QA completed • PDCoordinator - Set event status to active/Registration opens after QA is completed
July 30, 2021	35 days (5 weeks)	<ul style="list-style-type: none"> • Eblast promotion
August 06, 2021	28 days (4 weeks)	<ul style="list-style-type: none"> • Second ad in Bar News
August 20, 2021	14 days (2 weeks)	<ul style="list-style-type: none"> • Eblast promotion
September 03, 2021	Presentation	<ul style="list-style-type: none"> • Speakers Workshop • Event presentation date

EXHIBIT 2

CLE Preparation Check List

Title: _____ **Course #:** _____ **Date:** _____

- ___ CLE Overhead Planning Form prior to getting course number from Brooke
- ___ Confirm details and provide seminar timeline to Program Chair
- ___ Confirm date/venue with Brooke
- ___ Lecture Program from Program Chair
- ___ Speaker Letters Complete/Sent
(Lecture Credit App, Grant of License, Speaker Reimb, Course Material Outline Instructions)
- ___ Requests Bios and Headshots from Speakers

Including in Formstack

- ___ CLE Credit applied for (sent to CLER / LSE)
- ___ Bar News Ad Form Complete/Submitted - Date(s) for Ad: _____
- ___ Bar News Ad Proofed/Completed
- ___ Fee Worksheet Complete & Approved
- ___ Course Book Start Form Complete/Submitted
- ___ Salesforce Entry Created & Proofed, confirm all aftermarket items available
- ___ **Salesforce Entry Live**

Post Formstack

- ___ Create Email Campaign through informz or other third-party provider.
- ___ Complete TA if traveling (at least 10 days prior in state and 30 days out of state)
- ___ Request travel laptop (if needed)
- ___ Course Materials & Grants of License Received from Speakers – Deadline to Receive: _____
- ___ Course Book Proofed
- ___ Course Book to Print (if needed)
- ___ Notify mailroom if taking printed books on site
- ___ Order Speaker nametags and table tents
- ___ Order Signs (if needed)
- ___ Finalize BEOs and AV requests with hotel

Pre-Event (One Week Out)

- ___ Seminar Registration Packet Prepared
(Big Room to include Roster, Certification Forms, Late Reg and Certification Form)
- ___ Confirm coursebook link emailed to attendees & **speakers**
- ___ Moderator's Opening Remarks
- ___ Load and test PowerPoints on Loaner Laptop (if reserved) and save to Thumbdrive
- ___ Confirm Course book PDF copy to inReach
- ___ Submit PD Work Request with PPT(s) to upload to inReach.

Post Event

- ___ Scan rosters, late forms, certification forms and copies of checks to CLE file. Include copy of room block pick up (if applicable)
- ___ Complete Expense Report for any travel expenses
- ___ Send survey results to program chair

EXHIBIT 3

Program Chair Course Development Worksheet

Program chairs are responsible for overseeing the development of a CLE program. Prior to the event, program chairs, along with the steering committee, are responsible for (1) creating the theme and topics of the program, (2) selecting and confirming speakers, and (3) following up with speakers to submit their materials. Please be sure to read the Manual for Program Chairs, Steering Committee, and Speakers and distribute it as necessary.

To ensure required advertising period and a high-quality program, return this finalized course development worksheet to the program administrator 4 months prior to the event. For Webcasts, two months prior to the event.

Course Title:

Course Date:

Venue:

Course Level (Intermediate or Advanced):

Course Description (summary for credit and marketing purposes:

Program Chair (s) w/ city and email address:

CLE Credit Hours (_____ hours of general credit)

Bias Elimination: _____

Ethics: _____

Mental Illness Awareness: _____

Professionalism: _____

Substance Abuse: _____

Technology: _____

Certification Area:

Hours

Program Chair Course Development Worksheet

Steering Committee

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Name (First, Middle Initial, Last): _____
Email: _____
City, State: _____
Position on Committee: _____

Program Chair Course Development Worksheet

Program Schedule

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Program Chair Course Development Worksheet

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Start Time: _____
End Time: _____
Topic Title: _____
Speaker(s) Name (First, Middle Initial, Last), City: _____

Please attach a separate word document if more space is needed but include breaks, late registration time, and lunch in schedule timing. This schedule should be in final format for credit purposes.

Program Chair Course Development Worksheet

Other (information to be used for marketing purposes)

Why should someone attend this course:

Who should attend this seminar?

What will attorneys learn from this seminar?

EXHIBIT 4

Program Chair Worksheet – Audio Webcast

Program chairs are responsible for overseeing the development of a CLE program. Prior to the event, program chairs, along with the steering committee, are responsible for (1) creating the theme and topics of the program, (2) selecting and confirming speakers, and (3) following up with speakers to submit their materials. Please be sure to read the Manual for Program Chairs, Steering Committee, and Speakers and distribute it as necessary.

To ensure required advertising period and a high-quality program, return this finalized course development worksheet to the program administrator 4 months prior to the event. For Webcasts, two months prior to the event.

Course Title: _____

Course Date: _____

Course Level:

Intermediate

Advanced

CLE Credit Hours

(_____ hour(s) of general credit)

Bias Elimination:

Ethics:

Mental Illness Awareness

Professionalism:

Substance Abuse:

Technology:

Certification Area

Hours

Course Description (summary for credit and marketing purposes):

Please answer the following questions for marketing purposes:

Why should someone attend this course?

Who should attend this seminar?

Program Schedule

Topic 1

Start Time: _____ End Time: _____
Topic Title: _____

Speaker(s) Name (First, Middle Initial, Last):

City: _____

Email: _____

Topic 2

Start Time: _____ End Time: _____
Topic Title: _____

Speaker(s) Name (First, Middle Initial, Last):

City: _____

Email: _____

Topic 3

Start Time: _____ End Time: _____
Topic Title: _____

Speaker(s) Name (First, Middle Initial, Last):

City: _____

Email: _____

Topic 4

Start Time: _____ End Time: _____

Topic Title: _____

Speaker(s) Name (First, Middle Initial, Last):

City: _____

Email: _____

Topic 5

Start Time: _____ End Time: _____

Topic Title: _____

Speaker(s) Name (First, Middle Initial, Last):

City: _____

Email: _____

Steering Committee

Name (First, Middle Initial, Last): _____

Email: _____

City/State: _____

Position on Committee: _____

Name (First, Middle Initial, Last): _____

Email: _____

City/State: _____

Position on Committee: _____

Name (First, Middle Initial, Last): _____

Email: _____

City/State: _____

Position on Committee: _____

EXHIBIT 5



FLORIDA BAR
CLE COMMITTEE

OUR BUY-IN

*“It’s not that
we don’t know how.*

*It’s just that
we haven’t learned yet.”*

~ ~ ~ ~

**NOT YOUR PARENTS' CLASSROOM:
BEST PRACTICES IN EMPLOYING
TECHNOLOGY TO MAXIMIZE
THE IMPACT OF YOUR
FLORIDA BAR CLE**

By

**Tania Williams, Fort Lauderdale
Sam Dickenson, Austin, TX
Christy Foley, Sanford
Ashley Gantt, Miami
Brandon Haynie, Austin, TX
Jani Maurer, Fort Lauderdale**

Not Your Parents' Classroom: Best Practices in Employing Technology to Maximize the Impact of Your Florida Bar CLE

1) *The Connection Begins with You!*

- a. It's great to use technology, but the connection truly begins with you. Technology should be your accessory – not your crutch.
- b. Use your personality to connect with your audience. Be energetic and make a point of engaging your audience.
 - i. Consider using anecdotes, short videos, and memes to keep people's attention.
 - ii. Always follow-up each point with some type of engagement, such as:
 1. Chat questions
 2. Polls
 3. Links to survey for feedback
- c. When preparing your CLE, start with the end goal in mind.
 - i. What do you want to accomplish when you engage the audience? Write out three to four goals to take away and use technology to accomplish those goals.
 - ii. If you plan and prepare ways to engage your audience, you will be more successful.
 - iii. Also, anticipate lulls in engagement throughout the presentation. To handle those lulls, consider:
 1. Asking the audience about related topics/their relevant experience
 2. Doing a pre-survey at the beginning of the event and a post-survey at the end of the event (then compare the survey results in front of your audience)
 3. Plan segues for your transitions within the presentation so that those transition points won't create lulls
 4. Use unique and visually-appealing images/slides to grab people's attention and prevent lulls
 - a. Examples: Canva, Prezi
 5. Use the chat feature to keep a conversation going
 - a. This might require assistance from someone else who is not simultaneously presenting
 - b. You can prepare chat questions/scripts in advance to keep the conversation going
 - c. Direct specific questions at particular attendees to get those people engaged

2) *Use Breakout Rooms to Keep your Audience Engaged*

- a. The suggestions noted below are particularly useful in longer (four-to-eight hour) CLE programs to minimize online fatigue of attendees:
 - i. Start a CLE presentation by posing a question to attendees and place them in breakout rooms for five minutes to discuss the issue before closing the breakout rooms and returning to the speaker's presentation.
 - ii. The same technique may be used during a presentation to focus the attendees on a topic or issue in controversy.
 - iii. End a CLE presentation by posing a hypothetical about the material covered. Assign the attendees to breakout rooms in advance of the presentation to discuss the hypothetical and test their knowledge for ten minutes in the breakout room. This technique may quickly convince the attendees of the value of the program.
 - iv. Another alternative might apply where a CLE is about a topic of interest to attorneys with different interests, such as both transactional attorneys and litigators. After the main presentation, have presenters enter one breakout room to address information of particular interest to the litigators and place another speaker in a breakout room discussing matters of interest to the transactional attorneys.
 1. As another example, where the CLE program is about substantive law and ethics, attendees might be offered one breakout room focusing further on the substantive law and another focusing on ethics.
- b. Use breakout rooms between presentations to allow for networking and marketing.
 - i. Place one or more presenters in breakout rooms to enable attendees to visit with the presenter in a small group to ask questions or continue the conversation. If the presentation was a panel discussion, place each panel member in a separate breakout room.
 - ii. In between presentations, set up breakout rooms for attendees to network. This is possible in Zoom, where the breakout rooms may be set up in advance and attendees may either elect which room to join, or may be assigned randomly or preassigned in advance.
 1. Go-To-Meeting does not yet allow attendees to select their own breakout rooms, and attendees must be assigned to breakout rooms in advance by the administrator.
 2. In Go-To-Webinar, breakout rooms are not available.
 3. To enable networking in breakout rooms where participants are assigned randomly in advance, it is helpful to suggest a topic or ice-breaker for those in a room to discuss.
 - iii. In between presentations, allow sponsors to hold breakout rooms to present their wares. In Zoom, the sponsors may be in assigned breakout rooms announced in advance and attendees may elect to join a room.
 1. In Go-To-Meeting, sponsors may be in assigned breakout rooms, but an administrator needs to arrange for attendees to enter rooms.

- iv. At longer (four-to-eight hour) CLE programs, set up breakout rooms to allow different sections of the Bar to speak to attendees about the benefits membership in their sections offer and upcoming CLE programs.
- c. Which platform is being used (Zoom, Go-To Meeting, Go-To-Webinar, etc.) will impact the flexibility available in using breakout rooms.
 - i. In Zoom, breakout rooms may be set up randomly, or with attendees assigned to specific rooms, or with attendees self-assigning.
 - ii. In Go-To-Meeting, have attendees indicate in advance which breakout room they wish to be assigned to by the administrator.
 - iii. Consider using the notifications available to warn attendees in advance when a breakout room will close.

Useful Resources for Creating Polls



- 1) GoToTraining
 - a. Polls have to be set up in advance & InReache charges an extra fee to set those polls up for your CLEs

- 2) Zoom Polls
 - a. Easy to use and good for virtual events that are being held via Zoom
- 3) Poll Everywhere
 - a. Good for *both* hybrid events *and* in-person events
 - b. You can put pictures on it to make it more interesting
 - c. Allows people to see responses as they come in, which is engaging
- 4) Poll Maker
 - a. Good for *both* hybrid events *and* in-person events
 - b. Both the questions & the answers can have pictures
 - c. Not as fun as Poll Everywhere to watch the responses come in or show the final results

Useful Resources for Video Recording & Editing



- 1) Microsoft Screen Recording
 - a. If you're on a Windows device, just hold down Windows + ALT + R to start recording your screen

2) Microsoft Video Editor

- a. If you're on a Windows device, just drag & drop your video (or pictures) and edit the video pretty easily

3) Loom

- a. \$10 per month
- b. Record your screen and webcam simultaneously in case you want to explain what you're screensharing in a short video
- c. Editing style is a little different than most other platforms, so it takes a bit of practice

4) Adobe Rush

- a. \$9.99 per month
- b. Just drag & drop your video (or pictures) and edit the video
- c. Incredibly easy to use!

Look Great with a Virtual Background

Location, Location, Location!

- Silence your cell phone and warn those around that you will be filming. Ask your four-legged furry friends to stay in another room.
- Virtual backgrounds function by detecting contrast.
 - Be sure to wear a top that contrasts with the virtual backdrop.
 - Position yourself against a solid, empty wall that contrasts with your hair, shirt, and chair. For example, if you are blonde and wearing a pale shirt, sitting against a cream wall it will be difficult to keep your shape separate from the virtual background.
 - If your chair blends in with your shirt, toss a towel similarly colored to your room over your chair to prevent your chair from popping in and out of the shot.

Get Connected!

- Check your internet speed at the location you have chosen to make sure you have a strong signal. You should be looking at 5 MBPS upload and download. Hardlines (ethernet connected) are preferred since they will afford you maximum upload/ download speed and stability.
- Speed Checker: [Speed Test by Ookla](#)

Looking Good!

- The webcam on your laptop or tablet is usually lower than your eye line, bringing it up gives your audience the impression that you are looking right at them. A few books under your laptop should do the trick!
- Remember to sit up straight, smile often, and wear a color that compliments you but does not compete with your surroundings. Steer away from stripes, patterns, and sleeveless tops.

Light Up Your Stage!

- Make sure your face is well lit with soft light, natural or LED lighting works best.
- Avoid back lighting, especially by windows. Instead, face the window to gain some natural light.
- If your lighting is too harsh, throw pillowcases over the lampshades or a sheet over the window.
- Place LED lights on both sides of your laptop or tablet just outside your eyesight, this will allow you to see your screen and the lights to softly illuminate your face. An inexpensive light like [this one](#) from Target will help.

Headphones are Hip!

- Often the mic inside your tablet or laptop doesn't give you good vocal quality. Try headphones! Your recording will be better, and you will decrease unwanted background noise.
- If you are shopping for a headset, look at gaming headsets. They are designed precisely for good vocal quality and noise cancellation.

Gear We Like

Lighting



10" Ring Light
MACTREM LED Light Ring



Ulanzi Zoom Light



Cheap work lamp
from your garage!

Audio



Plantronics Blackwire
5210



Jabra Evolve2 40
MS Wired



Razer BlackShark
V2



Durable Arm Set
Studio Microphone with versatile
and sturdy broadcast arm

FIFINE Studio Condenser
USB Microphone

Other



Green Backdrop for
Virtual Backgrounds



Logitech C920



Razer Kiyo Pro



WorKEZ keyboard stand
for standing presentations

Spice Up Your CLE with InReach:

Animated Intros (0:07)

- Do you have a sponsor, speaker, or event that could use a [special introduction](#)?

Custom Slides with Embedded Video (1:55)

- Are you looking for [something more than just slides and a webcam](#)? InReach will create custom slides branded for your event, then bring in your speaker's content and overlay their videos on each slide.

Animated Titles (2:17)

- Looking for a touch of pizzazz? Consider adding [animated titles](#) for each speaker.

Custom Break Rolls (2:51)

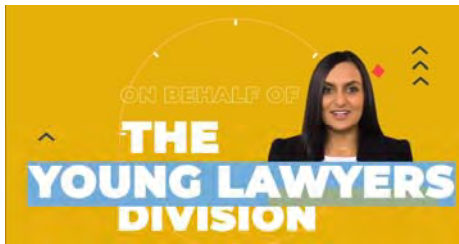
- Do you have sponsors to feature? [Custom break slides and videos](#) feature your sponsors while your event is on break.

Advertising Pre-roll (3:17)

- Need to advertise speakers and build buzz before the event to start? Custom pre-rolls give you the opportunity to [feature sponsors and welcome learners](#) to the event.

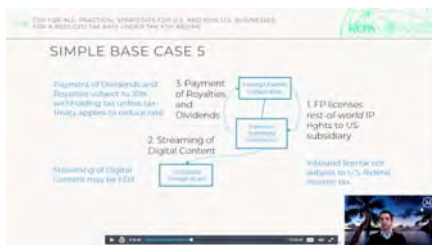
1

Animated Intros



2

Custom Slides with Embedded Video



3

Animated Titles



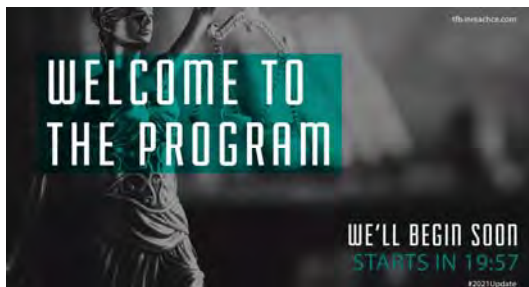
4

Break Roll with Countdown Clock



5

Advertising Pre-Roll



6

Social Media / Pre-Event Promotion



7

Quick Tips for Lookin' Great Online

Location, Location, Location!

- Select a location with an attractive or neutral background.
- Silence your cell phone and warn those around that you will be filming. Ask your furry friends to stay in another room.

Get Connected!

- Check your internet speed at the location you have chosen to make sure you have a strong signal. You should be looking at 5 MBPS upload and download. Hardlines (ethernet connected) are preferred since they will afford you maximum upload/ download speed and stability. Speed Checker: [Speed Test by Ookla](#)

Looking Good!

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- Remember to sit up straight, smile often, and wear a color that compliments you but does not compete with your surroundings. Steer away from stripes, patterns, and sleeveless tops.

Light Up Your Stage!

- Make sure your face is well lit with soft light, natural or LED lighting works best.
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Headphones are Hip!

- Often the mic inside your tablet or laptop doesn't give you good vocal quality. Try headphones! Your recording will be better, and you will decrease unwanted background noise.
- Look at gaming headsets. They are designed precisely for good vocal quality and noise cancellation.

8

**ALWAYS BE CLOSING: BEST
PRACTICES IN MARKETING GREAT
FLORIDA BAR CLE**

By

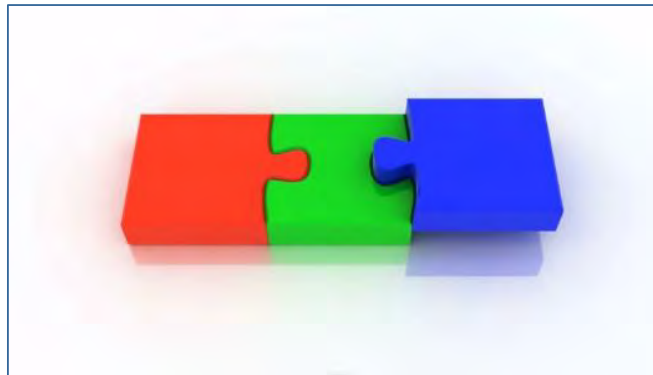
**Lisa Tipton, Searcy, AZ
Daniel Aller, Tallahassee
Jennifer Dorminy, Tallahassee
Anthony Musto, Miami Gardens
Julie Wilmer, Austin, TX
Jennifer Krell Davis, Tallahassee**

SPEAKER FEVER 2021

How to Prepare, Promote, and Present Great Florida Bar CLE

Segment 3

Always Be Closing:



Moderator

Lisa M. Tipton, President and Owner, PR Florida, Inc., Florida/Arkansas

Panelists

Jennifer Krell Davis

Director of Communications, The Florida Bar, Tallahassee

Julie Wilmer

Director of Client Service, InReach Continuing Education Solutions, Austin, Texas

Anthony C. Musto

St. Thomas University School of Law, Miami Gardens

Daniel Aller

Public Information Specialist, The Florida Bar, Tallahassee

Jenny Dorminy

Program Administrator, The Florida Bar, Tallahassee

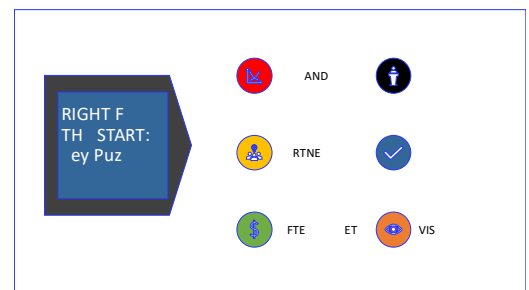
RIGHT FROM THE START: How to design Florida Bar CLE to enhance section revenue, short-term and long.



RIGHT FROM THE START: Key Puzzle Pieces Overview Jennifer Krell Davis and Lisa Tipton

Demand

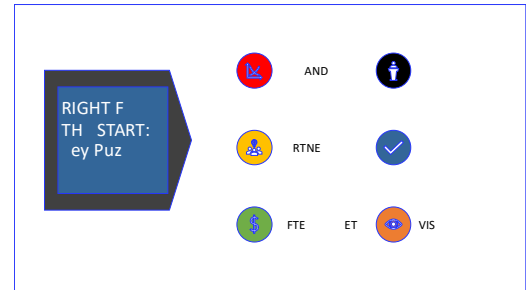
- Select CLE topics that you know your section members want to purchase.
- Be flexible enough to offer updates on key areas of law and CLE “how to” sessions. LegalFuel offered “I’m Not a Cat: How to Live Your Next Zoom Tripping” for a Texas lawyer’s recent Zoom-filter debacle that went viral.





Speakers

- Recruit presenters who are active on social media and can help with the promotions.
- Invite speakers who work in firms that have social media presences.
- Recruit industry experts: authors, professors, go-to attorneys for certain types of case law.



Partners

- Partner with other sections to create CLE that both can market.
- Create panels whose members can generate synergy between their respective firms or companies.



Approval

- Make sure to file your paperwork early so you have enough time to market the CLE in advance.
- Turnaround times for Florida Bar approval and accreditation and InReach registration setup vary.



Aftermarket

- Track aftermarket sales and offer CLE that traditionally has sold well.



Visuals (covered in upcoming segment)

LET’S START (MARKETING) AT THE VERY BEGINNING, A VERY GOOD PLACE TO START

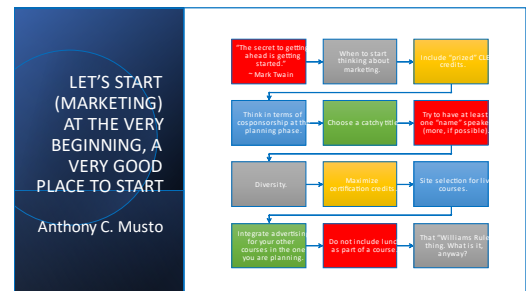
Anthony C. Musto

“The secret to getting ahead is getting started.”

~ Mark Twain



WHEN TO START THINKING ABOUT MARKETING



- A. As part of your overall approach to CLE, not when a particular course arises.
 1. Ongoing agreements with other sections.
 2. Ongoing agreements with committees.
 3. Ongoing agreements with other entities.
 4. “Season Ticket” approach to CLE (discount if one signs up for all courses).
- B. With regard to particular courses, at the very beginning of your planning.
- C. Do not plan the program first and THEN start thinking about marketing.
 1. It may be too late to change things in a way to help marketing.
 2. It may be too late to fix things that hurt marketing.



INCLUDE “PRIZED” CLE CREDITS

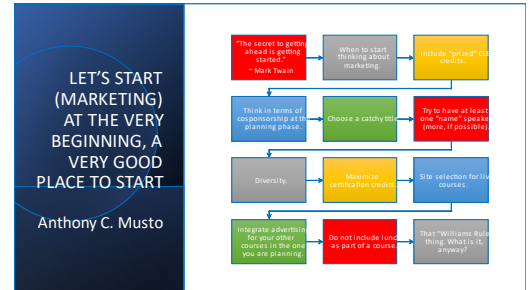
- A. Not door prizes, but specific types of CLE that lawyers must obtain.
 - 1. Ethics.
 - 2. Professionalism.
 - 3. Substance Abuse.
 - 4. Mental Illness Awareness.
 - 5. Bias Elimination.
 - 6. Technology.

- B. Rule Regulating The Florida Bar 6-10.3(b)
 - 1. Minimum of 33 credit hours every three years.
 - 2. At least three of the 33 must be in technology.
 - 3. At least five of the 33 must be in the other categories and at least one of the five must be in professionalism.

- C. Do the math. Technology is the one that lawyers need most (from the perspective of meeting the CLE requirements—from other perspectives, draw your own conclusion).

- D. Technology is also the one that most lawyers, rightly or wrongly, feel will help them most.

- E. Prized credits can be woven into presentations and need not stand alone.
 - 1. Sometimes, speakers will be doing so anyway. Find out in advance.
 - 2. If some aspect of a prized credit category easily fits a speaker’s subject, suggest its inclusion in advance.



THINK IN TERMS OF COSPONSORSHIP AT THE PLANNING STAGE

- A. Expand speaker pool.

- B. Get good substantive input.

- C. Get input as to what will sell to the audience the cosponsors will bring in.

- D. Think both in terms of cosponsors within and outside of The Florida Bar.

- E. Clarify financial terms.
 - 1. Revenue.
 - 2. Costs.
 - 3. Billing for Staff Hours (particularly with outside entities).



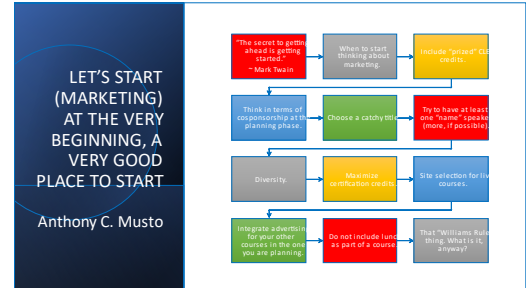
CHOOSE A CATCHY TITLE FOR THE COURSE

- A. Your goal is to get people to get people’s attention and have them look beyond the title.

- B. Boring titles invite being ignored.

C. Compare (for example):

1. _____ Law Update
Hot Topics in _____ Law
The Essential Elements of _____ Law
_____ Law: 20__
Legislative Changes in _____ Law
The (sorry, I fell asleep before I finished this one)



with

2. Cannabis: Getting Us High in the 20th Century, Getting Us Well in the 21st
“Look! Up in the Air, a Guitar?” Building Configuration Trademarks
WHAT DO YOU MEAN IT’S CANCELLED! The Legal Reality of a Pandemic in the
Entertainment Industry
Fin-tastic Beasts and How to Legislate them: Legislative Impacts on Sharks in
Florida

- D. Using boring references as the second part of a catchy title, however, can be effective.
- E. For specifically targeted programs (like certification review), direct titles can work.
- F. If focus is on broad range of attendees, avoid subject specific jargon.
- G. If focus is on practitioners in a specific field, subject specific jargon can be a plus.
 1. Example (referring to “the Williams Rule”)
 - a. if a general course on Evidence, avoid it.
 - b. if a course for criminal practitioners, it can be an attention grabber.
 2. Don’t know what “the Williams Rule” is? That proves the point. Its inclusion in a title for an Evidence course would not attract you and might actually make you less likely to go. On the other hand, you are not going to attend a criminal law course anyway so its inclusion there will not have an impact on you, but it might attract someone to whom it is significant.



TRY TO HAVE AT LEAST ONE “NAME” SPEAKER (MORE, IF POSSIBLE)

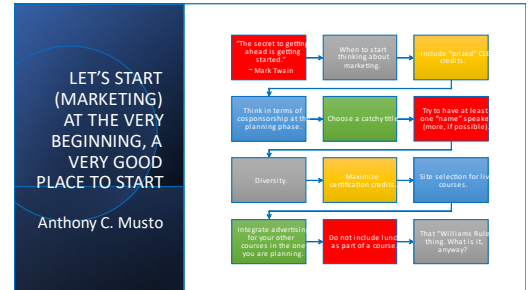
- A. Can be someone who is generally known.
 1. Often requires arrangements well in advance.
 2. More likely for a webinar than an in-person presentation that requires travel.
- B. Can be someone known within the field in Florida (usually a more obtainable goal).
 1. Highly regarded practitioners or judges.
 2. Practitioners or judges (highly regarded or not) who have handled highly visible matters.
 3. Authors of books accepted as authoritative by practitioners.
 4. Practitioners with a high media presence.
 5. Noted professors.



DIVERSITY

- A. A good goal independent of marketing.

- B. Can also be good for marketing/no downside.
 - 1. Do not utilize a diversity policy that will preclude approval of CLE credit. *See In re Amendment to Rule Regulating The Florida Bar 6-10.3 (Fla. April 15, 2021).*



MAXIMIZE CERTIFICATION CREDITS

- A. Board certified lawyers need a lot of certification credits.
- B. So do lawyers planning to seek certification.
- C. This is a huge market that looks not for CLE credits, but the certification credits.
- D. When feasible, ask speakers to address aspects of their topics that will allow their presentations to qualify for certification credits.
- E. Certification credits can be given for part of a program.
- F. Apply for certification credits in as many fields as possible.
 - 1. One segment may get credit in one field and another in another.
 - 2. The same segment may get credit in more than one field.
 - 3. Example: “Handling Appeals in Juvenile Cases” *may* qualify for)
 - a. Credit in Juvenile Law.
 - b. Credit in Criminal Law.
 - c. Credit in Criminal Appellate Law.
 - d. Credit in Marital and Family Law.
 - e. Credit in Education Law.



SITE SELECTION FOR LIVE COURSES

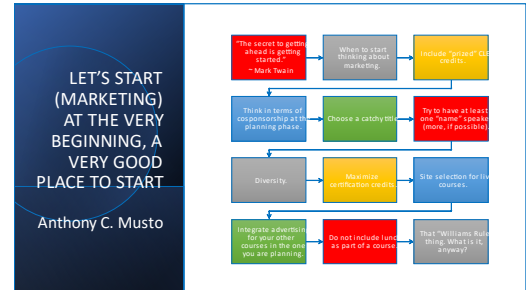
- A. Identify Your Market
 - a. Statewide
 - Central Location (Orlando, Tampa)
 - b. Airport Room or Airport Hotel (with shuttle, if not on property)
- 2. Local
 - a. Where are the lawyers?
 - b. What are the costs there?
 - c. What are the other options?
 - d. What are the costs at the other options?
 - e. Weigh reduced costs v. reduced attendance.
- B. Is your focus more on attendance or profit? Find a balance.
- C. Make sure your technical needs are met at the site.
- D. For the live presentation.
- E. For remote attendees, if any.

- F. For post-event marketing.
- G. Factor technical costs into your cost-attendance analysis.



INTEGRATE ADVERTISING FOR YOUR OTHER COURSES IN THE ONE YOU ARE PLANNING

- A. When appropriate, ask speakers to weave in references regarding related matters.
- B. When appropriate, ask those introducing speakers weave in such references.
- C. Plan to announce discounts for attendees who sign up for future programs.
- D. Avoid lengthy recitation of upcoming programs. Weave in or limit number.



DO NOT INCLUDE LUNCH AS PART OF A COURSE

- A. People don't like the food (usually with good reason).
- B. People feel (accurately or not) that they are paying more because it is included.
- C. People want some time to do other things during the day.
- D. Some people will not register because of lunch. No one will sign up because of it.
- E. Doughnuts and coffee before, during, and between sessions, however, are encouraged.



THAT "WILLIAMS RULE" THING. WHAT IS IT, ANYWAY?

- A. In the landmark case of *Williams v. State*, 110 So. 2d 654, 659-660 (Fla. 1959), the court held that "relevant evidence will not be excluded merely because it relates to similar facts which point to the commission of a separate crime. The test of admissibility is relevance. ... If the proffered evidence is relevant to a material fact in issue, it is admissible although it also points to a separate crime."
- B. The inclusion of the above paragraph qualifies this program for one certification credit in criminal law. (Not really, but it is not as hard as you think to get certification credit.)



VISUALS

Julie Wilmer and Jenny Dorminy

Quick tips for lookin' great online:

- A. **Location, Location, Location!**
 - o Select a location with an attractive or neutral background.
 - o Silence your cell phone and warn those around that you will be filming. Ask your furry friends to stay in another room.



B. Get Connected!

- Check your internet speed at the location you have chosen to make sure you have a strong signal. You should be looking at 5 MBPS upload and download. Hardlines (ethernet connected) are preferred since they will afford you maximum upload/ download speed and stability.
- Speed Checker: [Speed Test by Ookla](#)

C. Looking Good!

- The webcam on your laptop or tablet is usually lower than your eye line, bringing it up gives your audience the impression that you are looking right at them. A few books under your laptop should do the trick!
- Remember to sit up straight, smile often, and wear a color that compliments you but does not compete with your surroundings. Steer away from stripes, patterns, and sleeveless tops.

D. Light Up Your Stage!

- Make sure your face is well lit with soft light, natural or LED lighting works best.
- Avoid back lighting, especially by windows. Face the window to gain some natural light.
- If your lighting is too harsh, throw pillowcases over the lampshades or a sheet over the window.
- Place LED lights on both sides of your laptop or tablet just outside your eyesight, this will allow you to see your screen and the lights to softly illuminate your face. An inexpensive light [like this one](#) from Target will help.

E. Headphones are Hip!

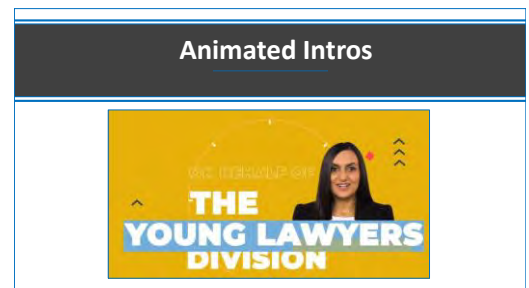
- Often the mic inside your tablet or laptop doesn't give you good vocal quality. Try headphones! Your recording will be better, and you will decrease unwanted background noise.
- Look at gaming headsets. They are designed precisely for good vocal quality and noise cancellation.

Spice Up Your CLE with InReach



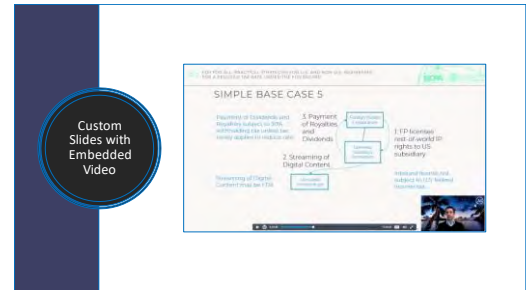
A. Animated Intros (0:07)

- Do you have a sponsor, speaker, or event that could use a [special introduction](#)?



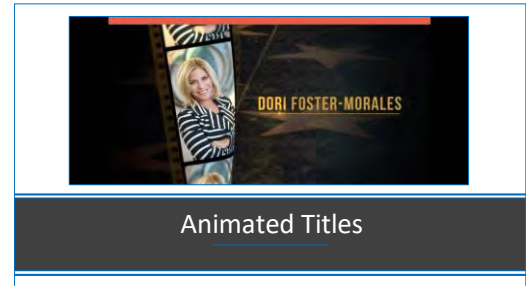
B. Custom Slides with Embedded Video (1:55)

- Are you looking for [something more than just slides and a webcam](#)? InReach will create custom slides branded for your event, then bring in your speaker's content and overlay their videos on each slide.



C. Animated Titles (2:17)

- Looking for a touch of pizzaz? Consider adding [animated titles](#) for each speaker.



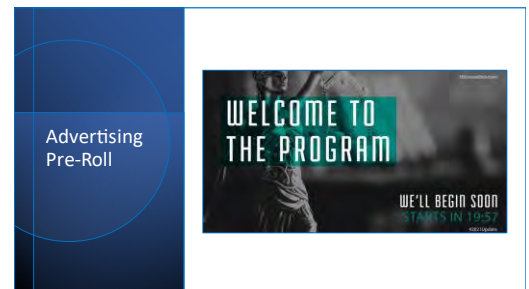
D. Custom Break Rolls (2:51)

- Do you have sponsors to feature? [Custom break slides and videos](#) feature your sponsors while your event is on break.

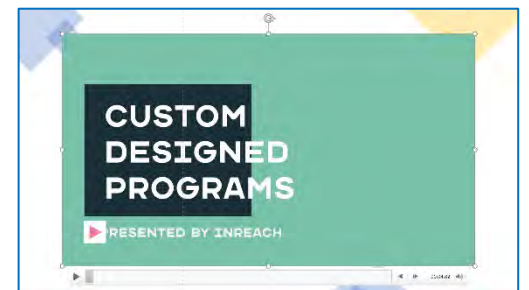


E. Advertising Pre-roll (3:17)

- Need to advertise speakers and build buzz before the event to start? Custom pre-rolls give you the opportunity to [feature sponsors and welcome learners](#) to the event.



Custom Designed Programs Presented by InReach (Video)



Social Media and Pre-Event Promotion (Video)



SEE YOUR PLAN THROUGH: How to market Florida Bar CLE through The Florida Bar — including the use of social media — to maximize event and aftermarket sales.



SEE YOUR PLAN THROUGH: Key Puzzle Pieces Overview

Jennifer Krell Davis



Email Promotions

- Informz is The Florida Bar’s internal email system that works with Salesforce. Each program administrator uses Informz to send CLE reminders and registration links.
- Some sections use outside email programs like Constant Contact and MailChimp, and some sections use both—as a way to reach more members.
- Marketing CLE through The Florida Bar’s Annual Convention promotions can boost CLE sales; the promotions highlight events and CLEs that are happening during the convention. InReach offers a “2021 Annual Convention” CLE search option.



Paid Promotions

- Use ad campaigns on Facebook and LinkedIn to boost your CLE’s marketing reach.
- Select demographics and practice areas/interests that match your topics.



Evaluations

- Consider doing separate evaluations that are specific to your program. Example: The Trial Lawyer Section’s board certification review course provides a separate evaluation and attendees tend to complete it because they know the feedback will be used to make changes for the next year.



Aftermarket

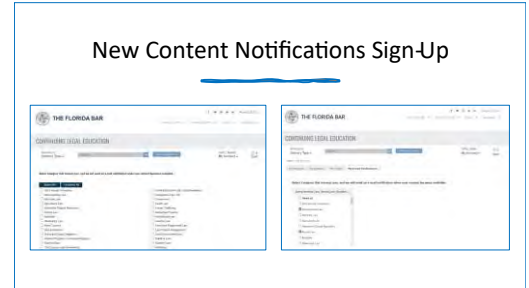
- A significant percentage of revenue for each CLE comes afterward, during the 18 months (or possibly longer, if renewed) that the CLE is offered in on-demand, podcast and CD/DVD formats.
- Don’t forget to periodically remind your section members the CLE is still available. Include links in email newsletters, on social media and in section publications.



Access

- Make your section’s CLE is easy to find: Submit correct (maybe multiple) search terms to InReach, create Facebook events, post to website calendar, website CLE page, etc.

- Create short, memorable links through Bitly or another online URL-shortener for use on social media: bit.ly/21_FL_Law_Update.
- Encourage section members to activate **InReach section CLE alerts** to receive CLE email reminders that include registration links. The longer your CLE registration is active, the more likely it is to be included in these alerts.
- The **screen shot on the left** is the user interface everyone encounters when creating a new InReach account. They can choose one, none or many categories for email updates. Each category generates its own category specific email. The **screen shot on the right** is the user interface within an established account where learners can update their preferences. When you log in to your InReach account you arrive on the “My Products” tab. Clicking the “My Email Preferences” tab to adjust your email preferences.



Social Media

Daniel Aller, Public Information Specialist, The Florida Bar

- A. **EFFECTIVE WAYS TO PROMOTE YOUR CLE ON SOCIAL MEDIA.** Whether it's a Facebook post, Instagram post or Twitter thread, there is a formula that we use often for promoting CLEs on social media. Most CLEs are presented in a very mundane format. But I'll treat them as if I'm writing an article for a newspaper and they tell me I only have a small amount of space to get as MUCH detail in as possible, while also making it interesting to read. Here are the steps I follow:
1. Start out with a catchy header—something attention-grabbing like, "ATTENTION: [KEY INFO.]"—and don't be afraid to use emojis to catch their eye like I did here.
 2. Kick the post off with the same way you would write a lead to a story—again, something catchy, attention-grabbing and creative.
 3. Then immediately get into the who, what, when, where and why. That way—JUST in case they don't read any more than 2 sentences before they keep scrolling—they at LEAST have the most important info. about the post right up top. (Keep in mind that Facebook only shows the first couple sentences and Instagram 100 characters before the “see more” link.)
 4. Ease into an introduction of your speaker or your panelists. Tag those speakers or their organization, if possible. If you only have one speaker like the YLD did here, you can go into a little detail about him or her. But if you have multiple speakers, try to keep it to 1-2 sentences on each.
 5. Once you finish speaker intros, give the reader a "call-to-action." Tell them why they should sign up for this and what they will learn/get out of it.
 6. Any extra details you have that can fill out the post, drop them here. For instance, on this post, Mark Eglarsh had JUST spoken to the Dade County Bar Young Lawyers a few days earlier and the event was terrific, so I mentioned this in the post.



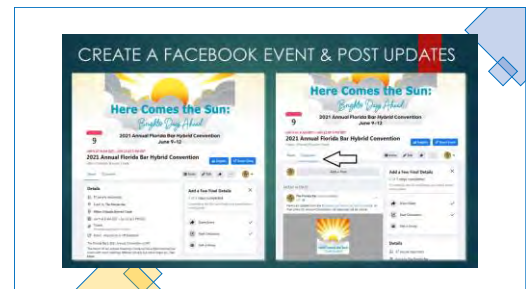
7. Do one final call-to-action, including mentioning (for the first time or again) how many CLE credits you will get. For CLEs where you are earning a LOT of credits, mention that higher in the post. But since this one was only 1.0 hours, I made the reader hunt for it a little bit because it's always something the reader WILL look for in a post like this.
8. Drop the link—and double-check it after you publish the post. NOTHING ruins a CLE post more than a bad link to Nowhere Land on the Internet -- and I see it happen all the time. (NOTE: If there isn't a registration link and you sign up by emailing an organizer, you would drop the contact information of the organizer here).
9. Use hashtags at the end of the post. Facebook's hashtag many years ago weren't searchable. But now they are. So if anyone is searching for hashtags that are on the topic your CLE is about, they can find it if you add hashtags at the end.

B. ALWAYS HAVE A MEDIA/ART ELEMENT: If you have an in-house graphic designer or someone who is handy with Canva or Photoshop, you're in good shape because EVERY promotion of a CLE on social media needs a graphic arts or media element in the post. Text-heavy CLEs with no art element will FAIL in the algorithms of these social media platforms and almost never be seen by the audience you want to see it. If you don't have someone to design graphics for you, then find a photo of the speakers or use something generic, such as free stock photos or your voluntary bar's logo if they're the ones hosting the event. Just make sure you use something that helps add another way to catch your followers' eyes.



C. REPETITIVE POSTING: Do not be afraid to post your CLE multiple times in the lead-up. Try to mix in other content in between those posts, but posting it 3 or 4 times a week—with a slightly varied caption each time if you can—will help get it seen. And don't worry about your followers being annoyed by it—because that's where the additional content being posted in between is key. It shows that you aren't trying to push this CLE—and this CLE only—down their throats, but it IS important enough to post about more than once.

D. CREATE A FACEBOOK EVENT FOR YOUR CLE AND UPDATE THE "DISCUSSION" PORTION WITH DETAILS ABOUT IT: - Creating a FB event is a good static way to get eyes on CLE. It shows up at the top of your FB page under "Events" and anyone who clicks "Going" or "Interested" will get notified when the day of the CLE gets close or arrives, or they will get notified any time you post in the "Discussion" portion of your CLE. I used The Florida Bar's Annual Convention event as an example because the meeting offers so many CLE opportunities and we try to update them all.




- E. **USING AD DOLLARS TO PROMOTE YOUR CLE:** You can advertise your CLE on any social media platform you feel like contains the majority of your followers, but we tend to get better results from **Facebook**. Creating an ad on FB is very simple—just go to the post you made for your CLE, click the "BOOST" button located on the bottom right-hand corner and fill out the parameters—like who your target audience is, what geographic region, the amount you'd like to spend and how long you'd like the ad will run. You can create a more detailed ad by choosing "Ad Manager" under your home page settings menu, but showing you how to create an ad in Ad Manager would take 15 minutes itself. The "BOOST" button is certainly capable of getting your ad seen plenty before the date of your CLE.




BUILDING BRIDGES: Forging public and private partnerships through the vehicle of Florida Bar CLE




BUILDING BRIDGES: Key Puzzle Pieces
Jennifer Krell Davis and Jenny Dorminy

-  **Florida Bar Sections**

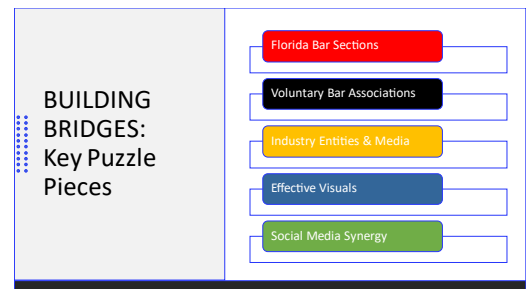
 - Program administrators can collaborate on cross-marketing CLE programs by providing section-member lists to other sections or by emailing other sections' CLE marketing materials to members. The Florida Bar encourages this.
 - If you are not already collaborating, be sure to tag other sections when your CLE offers relevant credit hours.

-  **Voluntary Bar Associations**

 - Local bar associations often have practice-area-focused committees or divisions; identify the leaders of those committees and ask if they will share your registration links.
 - If your CLE is in person, notify the bar associations in circuits around the city in which it takes place; they might be willing to include promotions in their communications materials in exchange for discounted registration.

-  **Industry Entities & Media**

 - Each section generally has association counterparts, e.g., the Criminal Law Section and the Florida Association of Criminal Defense Lawyers, that can partner to cross-promote CLE programs. Establish a rapport and perhaps even a fee-sharing arrangement for larger CLE programs.
 - Be sure to notify the law firms and/or entities with which your presenters are affiliated; they might be willing to include registration information in their newsletters or publicize the event afterward.
 - Think of ways to widen your reach by communicating with non-Bar entities.






Effective Visuals

- Canva is an online program that many use for graphic design and video production. You can animate graphics through Canva—great for Instagram and stories—and save as videos. Canva offers B-roll and stock video/photos.
- Microsoft Photos and Magisto are alternative video production tools.



Social Media Synergy

- Best practices for getting the word out include compelling graphics and tagging to encourage partnerships.
- Include the program breakdown, hours, clever graphic, credits, and encourage engagement to get more traction for the CLE.
- Identify large (or active) groups that might allow you to share the information—or share it for you.



Always Be Closing: Best Practices in Marketing Great Florida Bar CLE

SPEAKER FEVER 2021
How to Prepare, Promote, and
Present Great Florida Bar CLE

Moderator

- **Lisa M. Tipton**
President and Owner, PR Florida, Inc., Florida/Arkansas

Panelists

- **Jennifer Krell Davis**
Director of Communications, The Florida Bar, Tallahassee
- **Julie Wilmer**
Director of Client Service, InReach Continuing Education Solutions, Austin, Texas
- **Anthony C. Musto**
St. Thomas University School of Law, Miami Gardens
- **Daniel Aller**
Public Information Specialist, The Florida Bar, Tallahassee
- **Jenny Dorminy**
Program Administrator, The Florida Bar, Tallahassee