

ACLEA Awards Committee Report 2006

We are thrilled to report the results of the 2006 ACLEA's Best Awards. Every year we receive a multitude of outstanding projects in each category, which makes the task of selecting the award recipients more and more difficult. This past year we introduced a clearer set of judging criteria, which helped the panelists judge the projects more thoroughly. It is ever inspiring to see how our members produce such innovative and resourceful projects that not only help their own organizations, but also show the rest of us new possibilities for our own.

Below you will find a listing of awards in each category followed by short descriptions of each of the projects. New this year, the winners of the Award of Professional Excellence will be discussing their projects in workshop sessions at the Annual Meeting in Hawaii. If you would like to explore the winning projects in more detail, we have also included the name of a contact person you can reach.

Submissions for the 2007 awards will be due in Spring 2007. We encourage all ACLEA members to submit their best work. Start thinking now about the projects you might like to submit and look out for the entry forms in early 2006.

We are very fortunate to have dedicated award committees for each category who take the time to precisely evaluate each submission. We appreciate the time all of the committee members have spent evaluating each project. Thank you very much for your hard work!

Our thanks to the chairs and members of the subcommittees who did the hard work of judging a record number of entries.

ACLEA AWARDS COMMITTEE CO-CHAIRS

Liz Williamson, ABA-CLE

Ginger Shepard, Illinois Institute for Continuing Legal Education

AWARDS 2006

Program Category	TITLE	SIZE of Organization	ORGANIZATION / Contact Person
AWARD FOR PROFESSIONAL EXCELLENCE	ICLE Develops a Series of Certificate Programs	56.5	ICLE Jeff Kirkey 1020 Greene St. Ann Arbor, MI 48109 P: (734) 936-3434 F: (877) 229-4351 jkirkey@mail.icle.org
AWARD FOR OUTSTANDING ACHIEVEMENT	Advanced Evidence Skills	4 full time/2 work-study	Suffolk University Carole Wagan 120 Tremont Street, Boston P: (617) 305-1652 F: (617) 305-3099 ewagan@suffolk.edu
AWARD FOR OUTSTANDING ACHIEVEMENT	You Understand Construction Law, But Do you Understand Construction?	11.5	North Carolina Bar Association Foundation Melissa Noderer PO Box 3688 Carry, NC 27519-3688 P: (919) 657-1571 F: (919) 677-1774

A New Approach to Seminar Planning:
ICLE Develops a Series of Certificate Programs
Jeff Kirkey, Director of Partnership and Certificate Programs
Institute of Continuing Legal Education, Ann Arbor, MI

Background: Three years ago, attendance at ICLE's standard CLE seminars was down—tort reform, a slow business climate, no MCLE requirements in Michigan, and no significant new legislation (a result of term limits for legislators), all led to reduced attendance at CLE seminars. Our annual seminar interest survey, however, suggested a way out of the doldrums. The most popular idea was not a seminar, but “a series of probate and estate planning seminars that led to a certificate of completion.”

This reflected the challenges Michigan lawyers face. Litigation has diminished due to tort reform and the pressure to mediate and settle disputes. Many local businesses succumbed to competition from large brand-name companies (and their non-Michigan lawyers). Not only new lawyers, but experienced lawyers in hard-hit practices, want to learn new areas of law. Likewise, many baby boomers are looking for “career changes” within their profession. They need systematic training in new fields of law, along with a marketable credential. Our Certificate Programs are just the ticket!

To date, over 1,250 Michigan lawyers have enrolled in our first Certificate Program (Probate and Estate Planning) and 340 have completed it. Our second Certificate Program (Family Law) is set to launch. Market research for our third Program (Paralegal training) is underway. Seminar rooms that were half full for our usual estate planning seminars are now brimming. Speakers are energized, our curriculum is more expansive and innovative, our books sales at these seminars are booming, and participation in networking lunches at these seminars is high. The Certificate Programs have injected new life into ICLE's seminars.

ICLE Certificate Programs feature: 1) a comprehensive education curriculum at the basic/intermediate level for selected subject areas 2) individual seminars that are enhanced with more interactive features and more comprehensive materials 3) one or more required, limited-enrollment, graduate-style seminars where participants problem-solve and work in groups on a case study; 4) a personalized, flexible approach that mixes certain required seminars with electives and gives participants options; 5) a Certificate of Completion that can be advertised in marketing materials and is suitable for framing, 6) affordability.

Collaboration has been a key ingredient in the creation of Certificate programs. We worked for two years with the Probate and Estate Planning Section of the State Bar of Michigan to create the Probate and Estate Planning Certificate Program. Of the more than 1,250 Michigan lawyers who have participated, most are Section members. ICLE and the Probate & Estate Planning Section are thrilled with its success.

This year we finished the curriculum for a Family Law Certificate Program and will roll out the program this Spring. Although we traditionally competed with the Family Law Section, we sought and obtained their collaboration for this Program. They helped build the curriculum and will help market the concept to their members. Of course, many of their leaders will serve as faculty members.

The Probate & Estate Planning Certificate Program sells itself. It is very cost effective and has earned ICLE \$300,000 in revenue from program sign-up fees and the required limited-enrollment seminar registrations, plus hundreds of participants have joined the ICLE Partnership program.

For those who purchase ICLE's Partnership program, most Certificate seminars are included at no extra charge. As a result, more than 575 new Partnerships have been sold to 1,250 Certificate participants and

most retain those Partnerships year after year. Plus, more than 100 Certificate participants pay to attend ICLE's Annual Probate Institute, either as an elective in the program or to update their Certificate after completion of the program. We expect those numbers to grow as we begin to add extra features at the Annual Probate Institute just for Certificate graduates. Finally, Certificate participants have become devoted ICLE book purchasers—typical book sales at a Certificate seminar range from \$2,500 to \$4,000. In the past it had been \$500. Each book purchase includes a subscription to future annual supplements.

Program structure: To earn a Certificate, a participant must attend standard required seminars, elective seminars, plus one or two limited-enrollment seminars. Participants pay a one-time program fee of \$150, and they must complete the curriculum in 3 years. Upon receiving a Certificate, the successful participant can advertise as follows: “John A. Participant completed the Institute of Continuing Legal Education's Probate and Estate Planning Certificate Program and received a Certificate of Completion.”

The program presents information in a new, creative, or unusually effective format: The Certificate programs call for a comprehensive, structured curriculum that touches on all the significant topics for a practice area. The seminars build on one another, avoid overlap, and incorporate interactive features such as relevant video demonstrations, client interviews and case studies. All have comprehensive written supporting materials. In addition, we regularly offer participant/faculty networking lunches for mentoring.

Most innovative are the required graduate-style seminars which are limited to 21 registrants per session. Each of the current seminars revolves around a typical estate planning or estate administration scenario. Registrants receive the scenario and their preparation assignments in advance. The seminar itself is a mix of small group discussions, report-outs to the entire class and short faculty lectures or demonstrations. Each limited-enrollment seminar is taught by a single faculty member who has received ICLE training in facilitative teaching. Registrants receive a set of drafted documents with proposed “solutions” at the end.

ICLE Partnership Certificate seminars have had record attendance (250 for the live presentations and over 350 for video replays is typical) and high seminar evaluations (usually 6+ on a scale of 1 to 7, with 7 as the highest rating). The ratings for the limited-enrollment seminars are always over 6.5 and often receive a perfect 7! Registrants emerge from the seminars reinvigorated and more loyal to ICLE than ever before.

The program uses innovative ways to be cost-effective without sacrificing quality: To provide more self-service, we developed a web page just for participants to sign up for upcoming program seminars and to track their progress toward completion. We regularly send participants email reminders about upcoming seminars and program announcements without incurring additional expense. We recruit the same faculties from year to year which helps reduce staff time in preparing course materials. Every graduate-style seminar uses the same course materials regardless of who is teaching the session.

The program improves legal services for the public by improving CLE for lawyers: In the past, very few Michigan lawyers had formal training in probate and estate planning and family law. Now, the Certificate Programs provide participants with an extensive core CLE curriculum, expert advice on the law and practice issues, faculty mentoring, hands-on problem solving, and excellent supporting written materials. These programs help ensure better representation for the public.

The program demonstrates effective use of the organization's available resources: We made excellent use of our close relationship with Bar Sections to recruit expert advisors, obtain case studies, plan the curriculum, and recruit faculty. The Sections also helped us spread the word about the Certificate programs through their marketing channels and, more importantly, word of mouth. With respect to the curriculum, we enhanced many of the seminars we already offered and used our expertise and contacts to

develop additional seminars. The marketing for the Certificate programs is targeted and cost effective. Much of it is incorporated into existing marketing for our Partnership program and its seminars. The limited-enrollment seminars use standardized factual scenarios, the faculty members are trained and offer repeat sessions. The marketing for these seminars is very inexpensive since the market is so targeted (program participants only). A special area of ICLE's web site provides customer support.

The Center for Advanced Legal Studies, Suffolk University Law School
Advanced Evidence Skills
Entry for ACLEA's Best Program

Advanced Evidence Skills should be recognized by ACLEA because it took a unique and unprecedented approach to skills training unlike any other in the country. According to our co-sponsors, the Massachusetts District Attorneys Association (MDAA) and the Committee for Public Counsel Services (CPCS), *Advanced Evidence Skills* broke new ground by being the first to bring the two opposing sides together to plan and produce a two-day trial advocacy program that combined their mutual resources for the benefit of the criminal bar and the public they serve. By creating a new paradigm for skills training, turning adversaries into colleagues and using their combined skills and resources, *Advanced Evidence Skills* improved legal services both for the people of the state, represented by the prosecutors, and for the indigent accused, represented by the public defenders office. This program established a model that, if replicated by others, could contribute positively not only to the quality of advocacy but also to the promotion of civility.

Each side has traditionally trained its own. It was unheard of to take adversaries and put them in a room together for specialized training, for fear that they would learn each other's "secrets." Getting MDAA and CPCS together was an act of diplomacy by one of the members of our clinical faculty who had credibility with both groups. The Executive Director of the MDAA is an alumna of Suffolk and she was convinced that both sides could benefit from a joint training effort organized by Advanced Legal Studies (ALS). Overcoming the initial reluctance of the two training directors to put their limited resources into helping train "the other side" was a delicate process. The recognition that the justice system works best when both sides are skilled, respectful and professional was the inspiration for the organizers and, ultimately, the message imparted to the attendees. At the closing session, a prosecutor articulated this message saying, "Although in our professional capacities as prosecutors and CPCS-defense attorneys we may represent adverse legal interests, as a group we comprise a significant portion of the criminal justice bar in the Commonwealth and we play a vital role in the survival of the criminal justice system."

Presents information in a new creative, or unusually effective format

Among the features that set *Advanced Evidence Skills* apart are:

1. Suffolk created a forum for an unusual collaboration between prosecutors and defense counsel in planning the program, developing the case study, and recruiting the faculty;
2. it shifted the paradigm regarding the best way to learn, proving that there is much to be learned, and in fact there are advantages, by training with the other side;
3. the stimulation and enhanced learning both sides experienced during the training from working together in small groups of 3 prosecutors and 3 public defenders – and "changing sides" for some exercises;
4. the extent of the individualized critique offered to the participants by the faculty consisting of one experienced prosecutor, one experienced defense counsel and one Trial Court judge in each small group session – a ratio of 3 faculty to each 6 attendees;
5. the specialized (criminal practice only) collaborative nature of the program attracted the most qualified attorneys from each side, who themselves felt they gained from the unique opportunity to work together;
6. judges, who generally decline to train for just one side, participated enthusiastically to the mutual benefit to the bench, the bar, and the public;

7. the use of real mental health professionals from University of Massachusetts Medical Center, who as part of the program were both interviewed by the participants as part of their preparation and testified as experts in the expert witness exercises;
8. the experience level of the faculty conveyed to the participating attorneys the message that their work was respected and valued;
9. defense counsel and prosecutors helped each other by sharing their critiques and advice;
10. the program was dedicated solely to public interest attorneys.

Uses innovative ways to be cost-effective without sacrificing quality

It was important to the success of this effort that Suffolk offered a neutral location and sponsorship to bring the bench and bar together. The time commitment for both sides to create a case study, the problems and the supporting materials was significant. The costs of the program were minimized by each group choosing its participants, thus eliminating the need for publicity. All faculty were volunteers. By combining the resources of MDAA, CPCS and ALS, the costs for any one group were minimized. CPCS used its contacts with the medical center at University of Massachusetts to recruit doctors as experts. Suffolk was able to recruit our students to volunteer their time as lay witnesses.

Improves legal services for the public by improving CLE for lawyers

The commitment of the judges, CPCS, and MDAA to this collaborative effort sent a clear message to the attorneys participating in the training about the value of their work, of skill enhancement, and of collegiality. Creating a learning environment with both sides in a small group setting gave the experience more credibility and value. Hearing honest feedback from trial judges and expert litigators added to the quality and benefits of the training. The two training directors felt that the collaborative training resulted in a more effective learning experience providing different views and arguments on evidentiary issues and different perspectives on how to analyze those issues. To quote a public defender, "Working with prosecutors and having the opportunity to argue against them in a classroom setting was very helpful." Another said, "I enjoyed interacting with 'real' ADAs, judges and experts in a mock setting. It created an extremely realistic environment, minus the real consequences." The public benefits from this program because the criminal justice system functions better when its advocates are skilled and respectful.

Effective Use of the Organization's Available Resources

At the start of the planning process, a stumbling block was that neither the ADAs nor CPCS had funding to send their attorneys to the training. Suffolk's Macaronis Institute for Trial and Appellate Advocacy agreed to underwrite the expenses. ALS donated considerable staff time toward planning and organizing. The law school provided a convenient location, a neutral and academic setting and a sufficient number of classrooms to accommodate eight groups. As part of the program, MDAA and CPCS both thought it would help build relationships to include lunch as part of the program. Each group agreed to pay for lunch one day of the 2-day program. This was their financial contribution. We staffed the rooms with Advanced Legal Studies personnel (4) and the members of the planning committee (4) to make sure there was one person assigned to each room. We were able to find witnesses for the direct and cross examinations from among our law students, who also benefited from their participation, as they learned from playing their roles and hearing the critique offered in the classroom. Because attorneys traveled from all areas of the state to participate, Suffolk made dorm rooms available at an affordable rate.

Advanced Evidence Skills should be recognized for creating a new model for collaboration and for proving that learning effective advocacy means training with not just your own side.

Marketing Category	TITLE	SIZE of Organization	ORGANIZATION / Contact Person
AWARD FOR PROFESSIONAL EXCELLENCE	The New Lawyer Experience	30	Minnesota CLE Tim Morrow 2550 University Avenue West, Suite 160S, St. Paul, MN 55114; 651.254.2115; tmorrow@minncle.org
AWARD FOR OUTSTANDING ACHIEVEMENT	Brand Recognition	2	University of Mississippi CLE Renee Moore P.O. Box 879, University, MS 38677- 0879; 662.915.6738; moore@olemiss.edu
AWARD FOR OUTSTANDING ACHIEVEMENT	Focus on February Brochure	11.5 CLE Staff; 2.5 Marketing Staff	North Carolina Bar Association Foundation CLE Tawnya Louder-Reynolds 8000 Weston Parkway Cary, N.C. 27513; 919-657-1570; TlouderR@ncbar.org

Minnesota CLE's New Lawyer Experience 2006

Explanation of Marketing Campaign

THE EVENT

The New Lawyer Experience is an annual two-day institute consisting of both plenary sessions and workshops designed to meet the educational needs of new lawyers. Plenary sessions at this year's event included a keynote address from a prominent Minneapolis attorney, a judges' panel: "Your Day in Court: What to Expect and What Judges Expect of You," and a fun and informative panel discussion: "Quick Answers to the Legal Questions that Friends, Relatives and Strangers Will Ask You at Cocktail Parties."

We programmed twenty-two workshop sessions in three tracks: Litigation, Large Firm Practice and Small Firm / Solo Practice. Workshop sessions included: "How to Conduct a Residential Real Estate Transaction," "How to Draft a Simple Will," "How to Take and Defend Depositions," and "How to Look Good in Court . . . Even as a New Lawyer."

The New Lawyer Experience also included two lunchtime presentations on topics of interest to new lawyers: "The Insider's Guide to Insurance: What You Need and Why" and "Minnesota CLE's Practice Resources for New Attorneys."

THE MARKETING CAMPAIGN

Minnesota CLE designed a creative, adventure-themed marketing campaign to generate a buzz around our New Lawyer Experience event. New lawyers are all bravely embarking on a great adventure and we wanted to reflect that adventurous spirit in our advertising. We felt that the theme captured the excitement that new lawyers feel at the beginning of their legal career.

We initiated the campaign with a promotional appearance at the October new lawyer admission ceremony. Each of the 800 new lawyers received a six-page, full-color brochure outlining the benefits of the program along with a customized "New Lawyer Experience – The Adventure Begins . . ." chocolate bar. With a nod to Willy Wonka, five of the chocolate bars contained "Golden Tickets" awarding the lucky winners free admission to the New Lawyer Experience.

In the subsequent e-mail and brochure mailing campaign, we directly targeted new lawyers, a group that includes attorneys admitted to the bar within the last three years. It is those lawyers who were the intended course attendees. We used bold graphics and catchy text to reach this audience. Yet we did not sacrifice substantive and concise delivery of the offer itself -- that offer being high-quality, low-cost continuing legal education specifically designed for lawyers in their early years of practice.

Not only did we intend to make a clear, enticing offer to the potential attendees, we also wanted to convince the secondary target of our advertising campaign -- the remaining members of the bar -- that the program was a valuable educational event. Our reasoning: It is often these more experienced attorneys who will encourage new lawyers whom they know (and perhaps supervise) to attend our programs.

THE RESULTS

The marketing campaign we designed accomplished and exceeded our registration goals. The New Lawyer Experience generated so many registrations (240) that we sold out our conference center. Of those 240 attendees, 149 were in their first year of practice and 170 were in their first three years of practice.

Minnesota CLE leveraged the talent of a team of its employees (graphic designer Julie Capocasa and program attorneys Tim Morrow and Julie Casserly) to conceive and design these marketing pieces in-house, thus making effective use of available resources.

We believe that the originality and high quality of this effective marketing campaign make it a worthy candidate for an ACLEA's Best Marketing Award.

Brand Recognition and Simplification of Brochure Design and Distribution Process

University of Mississippi Continuing Legal Education

In order to distinguish ourselves from our competitors, UM-CLE began a campaign to establish an easily recognizable brand for the marketing of our programs. Over the last few years, our customers have received an ever increasing amount of marketing for CLE programs from our competitors. This has led to confusion among our customers over the institution providing particular programs. By establishing a conspicuous brand in our marketing materials, UM-CLE programs would be quickly recognized by our customers. Therefore, enrollment in our programs could benefit from the reputation UM-CLE has established over the years and the loyalties many of our customers feel towards their alma mater. Furthermore, the establishment of a consistent brand has the added benefit of saving cost and staff time in designing marketing material and distribution. The results of this marketing campaign has been consistent growth in our revenues and stabilization of marketing costs.

Contact Information

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ACLEA's Best Awards Submission **Best Marketing** category

Marketing Campaign: Brand Recognition and Simplification of Brochure Design and Distribution Process

Details of Award Criteria:

1. **The marketing campaign targeted a specific audience:** The University of Mississippi Center for Continuing Legal Education ("UM-CLE") enjoys tremendous support from law school alumni, so we endeavored to create a "brand specific" look that was easily recognized by alumni. The graphics "template" is carried over into all forms of marketing: printed advertisements, postcards, brochures and web page(s). As the largest CLE provider in the state, UM-CLE's primary competition is out-of-state commercial CLE providers. Therefore, we targeted two groups in our campaign. Our primary target group was members of the Mississippi Bar who make up the majority of our customers, and who ostensibly would prefer to spend their CLE dollars with an in-state provider. Our second target group was University of Mississippi alumni in order to capitalize on their loyalties to our organization.

2. **The offer is developed in a clear and concise manner:** When examining the marketing strategies of our competitors, it became apparent that many of their advertisements were not uniform in appearance. Competitor’s marketing pieces which did have a uniform appearance were the out-of-state providers which did not have the loyal customer base that UM-CLE enjoys. UM-CLE brochures are easily identifiable, and the cover text conveys the offer clearly and concisely. Broad use of the UM-CLE graphics template allows our customers to quickly pick out our programs from the increasing amount of marketing they were receiving for other programs. Therefore, the marketing of our programs could effectively capitalize on the reputation UM-CLE enjoys with our customers.

3. **Printed materials makes effective use of copy and graphics:** The primary area where we wished to establish brand recognition was in our mailing materials. This was done by going to one template design for the brochures for all our programs. This template always prominently displayed our UM-CLE logo as well as graphics and text for the program which, although always similar, still reflected the individual character of the particular program. The brochures also always used a single color ink on white paper, thus allowing for a wide variety of brochure colors while still keeping them consistent and easily identifiable.

4. **The results and effectiveness are capable of being tracked:** The best indicator of the success of this marketing strategy is a marked increase in gross receipts since implementation of this “brand recognition” marketing strategy. Since adopting this marketing strategy, revenues have consistently increased. UM-CLE’s gross income has increased by over fifty percent between fiscal year 2002-2003 and 2005-2006. There is no other explanation other than the effectiveness of the campaign. When adjustment is made for program cancellations and temporary suspension of CLE requirements in f.y. 2005-2006 due to hurricanes Dennis, Katrina and Wilma, interest and attendance at our programs have consistently increased.

	Date	Number of Programs	Average Attendance
Prior to marketing plan	FY 2001-2002	32	49.38
With new marketing	FY 2002-2003	24	60.81
	FY 2003-2004	30	55.06
	FY 2004-2005	25	53.36
	FY 2005-2006 to date	14	61.30

5. **The vehicle or campaign demonstrates effective use of the organization’s available resources:** By using the template, UM-CLE is able to save money and staff time. The template allowed us to quickly and easily relay the necessary information for an upcoming program to the graphic designer. Because the designer knows what is expected for the finished product, little time was wasted proofing and recreating the brochure. The template is consistent – only course-specific text changes are required. Therefore, the graphic designer can simply cut and paste new text into the existing template. This is a huge advantage to our small staff. We are able to “share” a graphic designer with other departments and still run our 35-40 programs each year with a staff of two (2) full time associates and one (1) part-time student worker.

6. The entry demonstrates effective use of the organization's available resources, bearing in mind both the staffing and financial resources available to the organization:

Because the brochure is consistent in size and formatting, we can outsource printing, address labeling and mailing of the brochures to a single clearing house without worry about unexpected costs or difficulties. Printed media all consists of a single ink color on white paper. The printer knows what to expect with each project, and printing costs are both consistent (29.41 cents per piece, printed and mailed) and kept to a minimum. Obviously, knowing almost exactly what the printing and mailing will cost (based on prior projects) is essential in budgeting for profit. Outsourcing printing and mailing again saved valuable time among our small staff.

Marketing Campaign: **The Focus on February 2005 Brochure**

1. **Targets a specific audience:** The *Focus on February 2005 Brochure* was developed to capture, in one convenient brochure, all CLE programming available during the last month of the MCLE reporting period ending Feb. 28. It was also designed to increase program sales during this same period by building upon a strategy that hit targets with consistent messaging one drop after another during a succinct period of time. The campaign included a direct mail brochure (the *Focus on February* 22-page brochure), premier print advertising space in the *CLE Bulletin* (the bi-monthly publications & program catalog), as well as electronic marketing. Marketing tactics were timed to drop late December, again in late January and again early February and each targeted 17,000 N.C. attorneys. Showcasing the number of live and video replay programs at multiple locations across the state, the campaign targeted attorneys statewide with a call-to-action to “Focus on February” and to register for CLE programs to meet their MCLE requirements.

2. **Offer developed in a clear and concise manner:** The *Focus on February 2005* brochure was the featured component of this campaign. Brochure layout highlighted CLE program offerings based on the geographic locations of three cities strategically located throughout the state for best audience reach, as well as statewide video replay offerings, live Webcasts and teleseminars. The brochure was designed with the creative use of 2-color to maximize readability and minimize costs otherwise associated with four-color process. Each program listed was denoted by a program icon – Video Replay [📺]; Live [🌐]; Webcast [📺]; TeleSeminar [🎧] – for quick customer identification. To use the most of the limited space of a hand-held, user-friendly catalog of this size, we created a back-of-catalog tuition chart juxtaposed to the registration form that is coded based on tuition categories. To further support the campaign, premier print advertising space in the *CLE Bulletin* (the bi-monthly program catalog) repeated the Focus on February messaging and called for attorneys to register for needed MCLE by calling the CLE department or by visiting www.ncbar.org/CLESearch to search for live programs, live Webcasts, video replays or online CLE programs. The February issue of *CeLEeView* (a monthly electronic newsletter) carried the same message to “Focus on February” and drove February registration traffic to www.ncbar.org/CLE.

3. **Printed material makes effective use of copy and graphics:** February is the end of the extension period for N.C. attorneys to meet the State Bar MCLE requirements. To capitalize on the *Focus on February* theme, the marketing campaign was developed to include a print catalog, print advertising and electronic marketing. Through effective design elements the urgency to focus on February appealed to the needs of the target market. The use of graphic imagery and consistent messaging was carried throughout the print advertising and electronic marketing, further strengthening the overall presentation and message of the campaign.

4. **Results and effectiveness can be tracked:** By timing consecutive marketing drops during the grace period “crunch,” we effectively capitalized on a marketing opportunity to increase program sales for a positive return on investment. The strategy also demonstrated good fiscal management by keeping campaign costs low. For every marketing dollar spent, \$14.00 in

revenues was realized.

5. Demonstrates effective use of the organization's available resources: Originally designed by our in-house designer, the *Focus on February* brochure is a template that the CLE desktop person updates yearly with new information, while retaining the design and format intended by the designer. Because of its design versatility, the *Focus on February* brochure and accompanying marketing campaign were easily tweaked by changing colors, which meant the brochure design could be reused for three years to test the market sustainability of the printed piece. This effective use, and reuse, of resources reduced the overhead expense of working with a designer every year on a new print piece, as well as provided the opportunity to introduce a new brochure concept and to test its viability for a three-year period to determine the market response rate to a new campaign.

6. Demonstrates effective use of the organization's available resources, including staff and financial:

Working in collaboration with the in-house designer, we developed a two-color brochure that effectively managed production costs within budget while maximizing marketing presentation. The two-color, 22-page brochure catalog was designed with desktop flexibility in mind. With only 2.5 staff on the CLE marketing team, we needed a brochure that the CLE desktop person could manipulate without having to spend the additional monies, normally associated with a redesign, to employ a designer for a yearly update. We were able to achieve this end very successfully and now have a brochure catalog design that can be manipulated by the CLE desktop person without the added expense of employing a designer when contact changes from year to year.

Contact: Tawnya Louder-Reynolds, North Carolina Bar Association, 919.657.1570 /
TlouderR@ncbar.org

Public Interest Category	TITLE	SIZE of Organization	ORGANIZATION / Contact Person
AWARD FOR PROFESSIONAL EXCELLENCE	Rebuilding After Katrina: A Guide to Business and Personal Insurance Claims and Coverage	161.5	Practising Law Institute Sandra Geller 810 Seventh Avenue New York, NY 10019 212-824-5796 sgeller@pli.edu
AWARD FOR OUTSTANDING ACHIEVEMENT	Current Legalities and Realities of the End-of-Life Debate	3	New Mexico State Bar Foundation Rob Koonce 5121 Masthead NE Albuquerque, NM 87109 505-797-6060 rkoonce@nmbar.org
AWARD FOR OUTSTANDING ACHIEVEMENT	Confronting Crawford	4	Suffolk University Law School Carole Wagan 120 Tremont Street Boston, MA 02108 617-305-1652 cwagen@suffolk.edu

Program Description

Hurricane Katrina was one of the worst natural disasters in U.S. history, causing unprecedented loss and hardship to the people of the Gulf Coast. As this region struggled to recover from the devastating effects of Katrina, Practising Law Institute developed a free continuing legal education program, “Rebuilding After Katrina: A Guide to Business and Personal Insurance Claims and Coverage Issues.” On October 6, 2005, PLI presented “Rebuilding After Katrina” live at its New York City Conference Center and simultaneously webcast the program to attorneys across the nation. PLI proudly submits this program to ACLEA for its consideration in the Public Interest Category.

PLI’s “Rebuilding After Katrina” program meets the following criteria for the public interest award:

- 1. Need for activity within the geographic area served:** Hurricane Katrina caused severe personal and financial loss to the people of Louisiana and Mississippi. While many of these losses will likely be covered by commercial or homeowners insurance policies, some will not. The “Rebuilding After Katrina” program was created in an effort to help the victims of Katrina, as well as the attorneys and insurers assisting them, gain a better understanding of the insurance coverage issues that will arise in Katrina’s aftermath.
- 2. Number of lawyers served:** PLI presented this free program live at its New York City Conference Center and by simultaneous webcast to attorneys across the nation. Approximately, 100 attorneys attended the live program in New York City and an additional 240 attendees viewed the live program on the web. PLI also provided “groupcasts” (group viewing broadcast live to a conference room or other remote venue) of the live program to approximately 160 attendees, 115 of which attended a groupcast offered by the Mississippi State Bar in the Gulf Coast region. Although the live program was presented in October 2005, it is still available to attorneys across the nation and around the world for a fee of \$25 as an on-demand web program through the PLI website.
- 3. Impact on the ability of lawyers to provide representation:** Hurricane Katrina not only impacted the residents of the Gulf Coast, but it also had a tremendous effect on the legal and insurance communities within the region and across the nation. The “Rebuilding After Katrina” program was designed to assist the victims of Katrina, as well as the attorneys and insurers who will be helping them to rebuild their lives. Attached hereto are comments from the program attendees and webcast participants demonstrating this program’s impact and value. (See tab 4.)
- 4. Use of innovative methodologies:** PLI sought to present “Rebuilding After Katrina” as quickly as possible in order to provide important information to the people of the Gulf Coast and those assisting them. The “fast track” nature of this program, combined with the geographic challenge of providing access to the program to those in the affected region (many of whom were unable to travel to the live program because of post-Hurricane travel issues) required PLI to use innovative technology to both market and deliver the program to attendees. Toward that end, PLI (1) marketed the program exclusively via e-mail to over 130,000 people in its database (see tab 3); (2) delivered the live program simultaneously to web attendees across the nation; (3)

offered web attendees the opportunity to e-mail questions to the faculty in real time; and (4) provided several groupcasts of the live program to attorneys across the nation, including 115 attendees in Jackson, Mississippi.

5. Is the activity a joint effort with one or more legal services, public interest or pro bono organizations?: While the program itself was developed and run by PLI, we were honored to work with the Mississippi State Bar to provide a pro-bono groupcast of the live New York City program to members of the Mississippi State Bar. This groupcast was held at the Imperial Palace Theatre in Jackson, Mississippi. LegaLink Mississippi State-Wide Reporters, a local court reporters' agency, also recorded the Mississippi event and made the transcript available upon request to the Gulf Coast legal community. PLI is also grateful to its distinguished volunteer faculty who generously donated their time and prepared written materials on extremely short notice so that this program could be presented as quickly as possible.

6. Ongoing nature of the activity: PLI continues to offer the "Rebuilding After Katrina" on-demand webcast of the live program and the course materials on its website for CLE credit to attorneys across the nation and the world for a fee of \$25.

7. Impact on the public: The intent behind this program was to provide attorneys, policyholders and insurers practical and timely information regarding the insurance coverage issues that will arise in the aftermath of Katrina. LegaLink Mississippi State-Wide Reporters sent court reporters to the Mississippi State Bar's groupcast in Jackson. They recorded the program and produced a transcript, which is available to the general public upon request.

8. Effective use of the organization's available resources: PLI recognized that a national disaster of this magnitude required an immediate response from the legal community. In an effort to promptly address the insurance coverage issues the Gulf Coast region would undoubtedly face, PLI marshaled the resources of its entire organization to organize this event as quickly and effectively as possible. The Program Attorneys reached out to our Insurance Coverage program faculty who responded by putting together an exceptional program on extremely short notice. Since this program was presented less than two months after the devastating events of Hurricane Katrina, our Marketing Department worked quickly to develop an email only marketing campaign to reach as many people as possible. Our On-Line Division was able to provide audio for the live program, while supporting the audio and video for the live webcast and multiple groupcasts allowing attendees across the country to view the program. Our Sales Department worked with the Mississippi State Bar and the LegaLink court reporters to coordinate access to this important program for those who needed it most. All this would not have been possible without the dedication and support of PLI's entire staff and volunteer faculty.



CURRENT LEGALITIES AND REALITIES OF THE END-OF-LIFE DEBATE
CLE Department, New Mexico State Bar Foundation

The escalated controversy in the spring of 2005 stemming from the Terri Schiavo case provided a prime opportunity for CLE organizations to discuss the various legal and ethical issues surrounding the end-of-life debate. In developing a continuing education seminar related to this concern, our CLE department decided it would be a timely occasion to potentially connect with not only our members, but also the public at large. We were able to do so through jointly sponsoring the program with the Public and Legal Services Department of our State Bar Foundation. The CLE seminar was supplemented by providing free living will (or advance health care directive, as it is called in New Mexico) workshops. It was a winning combination that provided our department an additional chance to market its seminar. As an added bonus, a probate judge who played an active role in the seminar, decided to write a local newspaper column a month prior to the event in which the CLE and workshops were highlighted. The judge had been instrumental in drafting the Uniform Health-Care Decisions Act (UHCDA) in New Mexico (which replaced right-to-die statements in our state). The CLE and free workshops were well-received by the public and the members of our state bar organization. Sixty-two members attended the CLE, 193 public participants signed advance health care directives at the free workshops, and over 400 total directives were dispersed by Public and Legal Services. The co-sponsored event between our CLE department and Public and Legal Services Department was a tremendous success.

Respectfully submitted,

Rob Koonce, Director
Center for Legal Education and Professional Development
New Mexico State Bar Foundation

ACLEA'S BEST – PUBLIC INTEREST ACTIVITY
Confronting Crawford: Understanding Its Meaning and Impact

The Supreme Court decision, *Crawford v. Washington* regarding testimonial evidence and the hearsay exception, generated considerable uncertainty as to the scope of the ruling and what evidence was admissible. Many criminal cases (and thus the guilt or innocence at question) turn on testimonial evidence; as a result it was imperative that judges and attorneys learn how to interpret the new ruling. Suffolk University Law School's Center for Advanced Legal Studies worked with numerous cosponsors to develop a CLE course which addressed the issues from all perspectives. The result was an audience comprised of judges, prosecutors and defense counsel. The blend of perspectives encouraged audience participation and provided for an enriched and interactive discussion.

The tuition for this course was \$129. To make this program financially accessible, a discounted tuition rate of \$79 was offered to members of the Massachusetts Association of Criminal Defense Lawyers and the public interest criminal bar. Due to limited training budgets, further scholarships and group discounts were offered. The reduced rates ranged from \$25-\$45 and were granted to the Committee for Public Counsel Services, the Flaschner Judicial Institute and the Massachusetts District Attorneys Association.

Additional efforts were made to make this course accessible. When the original date of September 22 sold-out multiple classrooms, an additional date of November 11 was added. Following the announcement of the second date, Suffolk received requests from around the state for additional dates and locations. In an effort to be responsive and provide access to all those who wished to view the course, we developed our first online course. The tuition for the online course is \$20, including the course materials. Through the use of multiple dates and formats (live and online) approximately 400 people have participated in the course. Of these participants, approximately 70% are public interest attorneys and 16% are judges for a total of approximately 86% public interest attendees.

This course should be recognized by ACLEA because:

1. It supplied critical information when lawyers needed to know how to apply the law to their cases;
2. It provided an analysis of the *Crawford* decision in a creative, interactive format. In a short amount of time, lawyers were educated on the meaning of *Crawford*, how it was being applied in Massachusetts and the trends in other jurisdictions (see attached letter to the editor regarding value of program);
3. Because of the co-sponsorship with the Flaschner Judicial Institute, 60 judges attended. The judges' participation enhanced the interactive discussion and provided valuable insight to the attorneys in attendance;
4. The program provided direction to judges as to how to interpret the landmark ruling and apply the law to pending cases;
5. The affordable tuition and numerous scholarships enabled many public interest lawyers to attend;
6. The online course increased accessibility to the program and as a result this is an ongoing activity;
7. The development of the online course was an innovative use of the school's technology and resources;
8. Co-sponsorship with the Macaronis Institute for Trial and Appellate Advocacy enabled Suffolk to offer the program at a low cost;
9. Suffolk maximized resources through the cooperation of our co-sponsors.

Need for activity

Judges and attorneys needed to learn, in a timely fashion, how the Massachusetts courts would interpret *Crawford* and how the decision would affect pending cases. Since testimonial evidence is often pivotal in criminal cases, the need to understand the implications of *Crawford* was critical. *Confronting Crawford* provided analysis to assist attorneys in making arguments to help their cases and gave judges an understanding of court interpretation for their own decision-making.

Number of Lawyers Served

To date, nearly 400 judges and attorneys were served as a result of the 2 live programs and the online course. The Center for Advanced Legal Studies at Suffolk University Law School granted approximately \$15,000 in scholarships and discounts to maximize the number of public interest attorneys who could attend.

Impact on ability of lawyers to provide representation

The following quotes, a testimony to the impact of the course, are from the course evaluation forms:

“I have a clearer understanding of what Massachusetts considers to be testimonial statements”

“Timeliness-direct and understandable presentation”

“Great course on critically important emerging issue of law”

“It was up to date with the most recent cases and direction of *Crawford* issues”

“Substance and clarity of presentations completely up to date on case law state and federal”

Use of innovative methodologies

Currently, Suffolk does not utilize the services of an online CLE service provider. As a result of demand for this course, Advanced Legal Studies worked with at least four other departments within the University to access technology and resources required to develop an inaugural online course. Without a platform for this, Suffolk staff worked to customize a teaching portal designed for use by faculty to aid in teaching fulltime law school courses. The course, as well as new processes for the generation of user IDs and passwords were developed within 2-3 weeks. All course materials were reformatted to maximize their use online. The online course includes an archived webcast (video and audio), the course book and copies of the speakers' PowerPoint presentations (pdf. format). It also gives participants the opportunity to join in live chats and access archived discussions.

Joint Effort

This program was a joint effort of the law school and it's Macaronis Institute for Trial and Appellate Advocacy, the Flaschner Judicial Institute, the District Attorneys, the public defenders, and the criminal defenders.

Ongoing Nature of Activity

Due to the demand for the online course, we have extended the time for viewing through the end of May.

Impact on the Public

Judges, assistant district attorneys and criminal defense lawyers who attended *Confronting Crawford* were all better able to serve their clients. The public benefited because prosecutors representing the interests of the state and the defenders representing indigent accused, could more effectively represent those interests. Some predict that the biggest fallout from *Crawford* is the impact on domestic violence and child abuse cases because of the need to now have complainants testify. These cases directly impact members of the public. Providing the tools to analyze these and other critical implications of *Crawford* made all involved more effective in their advocacy and decision-making.

Effective Use of Resources

Through two dates and a live video feed into a second classroom, we maximized our facility space. By co-sponsoring with the Macaronis Institute for Trial and Appellate Advocacy, we were able to keep tuition low and thus increase the number of attendees.

Confronting Crawford should be recognized as an outstanding public interest program because it provided critical and meaningful education to a significant number of public interest attorneys and judges and Advanced Legal Studies devoted substantial financial and staff resources toward making this program available to as many people as possible.

Publications Category	TITLE	SIZE of Organization total/pub. dept.	ORGANIZATION / Contact Person
AWARD FOR PROFESSIONAL EXCELLENCE	California Domestic Partnerships	165/50	Continuing Education of the Bar California Robin Kojima 510-302-0714 robin.kojima@ceb.ucop.edu
AWARD FOR OUTSTANDING ACHIEVEMENT	Elder Law in Pennsylvania	72/10	Pennsylvania Bar Institute Pam Smith 717-796-0804 psmith@pbi.org
AWARD FOR OUTSTANDING ACHIEVEMENT	Michigan Civil Procedure Online	50/11	The Institute for Continuing Legal Education Mary Hiniker 734-936-3437 mhiniker@umich.edu

Title: **California Domestic Partnerships**

Introduction. Passage of California's [Domestic Partner Rights and Responsibilities Act of 2003 \(DPRRA\)](#), which became operative January 1, 2005, was a landmark development in California family law, which historically has been grounded in a system of property, support, and related rights applicable only to married couples. With the passage of DPRRA, nearly all California-sanctioned rights and obligations of marriage were extended to couples who meet statutory requirements for state registration as "domestic partners." DPRRA became operative even as litigation was pending over its own constitutionality (since resolved in its favor) and over same-sex marriage in California, and as uncertainties loomed over sister-state and federal recognition of rights under DPRRA and of federal tax treatment of support, income, and transfer of assets of registered domestic partners.

Content; editorial process. CEB developed *California Domestic Partnerships* as a new, one volume, looseleaf publication to provide a practical, comprehensive guide to the new domestic partnership law, with the intention of serving not only family lawyers, but also practitioners active in estate planning, personal bankruptcy, and elder law. It was the first--and remains *the only complete*--treatment of the new law designed for use by attorneys. It addresses all provisions of the new law, and augments these with coverage of state and federal laws on specific issues for registered domestic partners, such as rights of community property, support, and parentage, employment and estate planning issues, and tax and bankruptcy ramifications. In addition to its substantive discussion of the new law, the publication includes both transactional forms (for example, attorney retainer letters and clauses for agreements) and selected court forms. In addition, it includes practice tips and cautionary advice concerning areas in which the law remains unsettled. It is organized in three major parts: (1) an introduction that places DPRRA in an overall legal and social context, while also discussing important ethical and practice issues; (2) core rights and obligations that flow from registration as domestic partners; and (3) procedural aspects of registering and terminating domestic partnerships.

Some 23 authors contributed content to this 800-page publication, including both attorneys and judicial officers, as well as one nationally prominent constitutional scholar. Like other CEB works, the text is fully supported by citations to legal authority, and includes references to relevant cases, statutes, regulations, and court rules. All manuscript was thoroughly checked for legal accuracy and went through a process of legal editing, copyediting, and review by outside readers. The publication is fully indexed, and includes tables of cases and statutes.

Style. The publication is written using a straightforward, practical style, typical of CEB publications, and does not resort to "legalese." Frequent use of headings and subheadings, with section numbers, make individual topics easy to locate and follow. Text discussions use an "inverted pyramid" style to enable the reader to first grasp the general rule before moving to specific examples or exceptions to the general rule.

Format. This publication uses CEB's standard layout for each chapter, which includes both a numbered outline and corresponding sections and subsections, with concise, descriptive headings to show the topics discussed. Frequent paragraphing and use of headings (along with the index) help the user locate particular topics. The text includes frequent internal cross

references, as well as cross references to other publications, and selected Internet websites. The text also includes “sidebar” type enhancements framed as “Notes,” “Practice Tips,” and “Warnings.” CEB uses a “modified Bluebook” citation format for cases, statutes, regulations, and court rules, that, for example, includes both an official reporter citation for cases and one parallel citation.

Attorney-drafted forms from the publication are available on a separate CD-rom, and the entire publication is available in an online electronic format (through CEB’s OnLAW™).

Market: The primary market for this publication is the California family law practitioner, with estate planning, personal bankruptcy, elder law, and general civil practitioners in California being additional potential markets. Nonattorney markets include law libraries, courts, and nonattorney mediators. This publication also has a potential market among family law practitioners outside of California, particularly in states that have recognized civil unions (e.g., Vermont) and in Massachusetts, which has recognized same-sex marriage.

Innovativeness: *California Domestic Partnerships* is the first and only text designed exclusively as a resource for *attorneys* that comprehensively covers the new domestic partnership law. It combines not only substantive treatment of the entire statutory scheme, but also procedural direction, forms, practical advice, and admonitions about unsettled areas of the law. Its internal cross references and references to other CEB publications are electronically linked for the online version of the text. Also unique in being updated annually, it will provide ongoing and current information for the practitioner.

Financial Aspects; Use of Resources. *California Domestic Partnerships* was published in 2005 within five months of the new law becoming operative, and within eight months of the first planning meeting of its contributing authors. It was published within its established time budget for project management, legal editing, word processing, copyediting, indexing, and production. The publication utilized standard word processing software, as enhanced by CEB’s existing templates for chapters, front and end matter. First year sales goals were met in under a year. Annual updating will take place through the use of existing legal editing and project management staff, thereby making it a part of CEB’s normal updating process.

ACLEA's 2006 Best Publication Award Submission
Elder Law in Pennsylvania
Pennsylvania Bar Institute

Description and Award Criteria

The Pennsylvania Bar Institute is pleased to present *Elder Law in Pennsylvania* (1st edition) as ACLEA's 2006 Best Publication Award Submission. The book is intended to provide an organized and accessible overview of elder law issues for Pennsylvania lawyers. It appeals to the 14,000 Pennsylvania lawyers who specialize in handling elder law and/or estate planning cases.

The material of *Elder Law in Pennsylvania* is organized into 15 chapters and is 670 pages. The book also contains an index of cases, a statutory index, and a subject matter index. When thumbing through the book, you will note the materials are well-organized and appropriately identified by concise headings and subheadings. Moreover, the text format is very conducive to quick reference. The author's writing style is clear and easy to read. Statements borrowed by the author are supported with footnotes at the bottom of each page. Sample forms are included at the end of each chapter. Practice tips, tables, checklists, and examples are included in many, if not most, of the chapters.

The book also includes a CD-ROM. The CD-ROM contains the text of the book in Adobe PDF format, and the forms are available in Adobe PDF, WordPerfect, and Microsoft Word. The forms on disk provide ready-made templates that save time and effort spent in re-keying or scanning.

While the publication is professional, the production costs are low. The book is produced on high-quality 8 ½ x 11-inch paper contained in a quality, vinyl binder with an attractive cover. Each binder costs \$3.89; the cover insert and spine card costs \$1.08; and the bank of tabs runs approximately \$1.91. The CD-ROM with paper sleeve costs approximately \$.30, and the cost of paper and printing is estimated at \$15.84. The book was published in house at the PBI print shop, and print shop employees assembled the book, thereby saving outside printing costs. Each book costs approximately \$23.02 to print. The book, including CD-ROM, retails at \$199.00.

Lastly, the book is innovative because of the area of law it covers and the manner in which the material is presented by the author. Over the past 20 years, the practice of elder law in Pennsylvania has become recognized as a distinct legal discipline. The book fills a perceived gap in the research resources available to lawyers by providing a broad, Pennsylvania-specific overview and guide to many of the issues that are significant in legal, financial and health planning areas for seniors.

While there are other Pennsylvania legal publications dealing with elder law issues on the market, they are narrow in scope. Many of these publications address Medicare or Medicaid issues and do not cover the myriad of topics so clearly and thoroughly presented as in *Elder Law in Pennsylvania*.

Best Publication: *Michigan Civil Procedure Online*

Submitted by the Institute of Continuing Legal Education, Ann Arbor, Michigan

Use the Enclosed Instructions to Access the Online Book

Michigan Civil Procedure Online, published in June 2005, exemplifies the unique features of our 22 online books and our new approach to updating. Our online books make full use of online features, maintain their print identity, are produced more efficiently, and are more accurate and timely than their print-only predecessors. Our new approach has exceeded staff and customer expectations. How does this work, and how is it feasible?

Content. In *Michigan Civil Procedure Online*, the text and forms are updated **continually**. Citations link to the full text of Michigan cases, statutes and court rules. As a book goes online, our legal editor shifts to our new method of updating. Instead of addressing each book once a year, the “litigation legal editor” monitors new developments on a daily basis. Using a special editor interface, she sees the customer view of the online book, but has instant access to editorial tools. From that interface, she can launch the XML file for a chapter, incorporate changes, and see an immediate and refreshed HTML view of what she has done. She can run a table of authorities of current cites. When the MI Supreme Court issues an order, she runs a script that lets her see where the affected case is cited in all our online books. She incorporates changes, and creates a “summary of changes” that flags recent developments. She consults the authors frequently and obtains input and additions. When it’s time to produce the annual print supplement, she does final research to confirm that she hasn’t missed anything, and sends a redline to the authors for final input. We then print the supplement from the same updated files, reprinting all the pages in the book.

This approach 1) is more efficient than our old method of revisiting the same changes sequentially; 2) results in a superior product (since editors can review and revise their changes on the fly); and 3) produces a more current printed product. In addition, continual updating allows us to notify authors of significant changes at a time when they appreciate hearing about them and need to consider the practical impact of a change on their practices. As a result, authors provide us with more input (and are happy to do so).

Online “look and feel”; format. We wanted to retain the book’s identity as a book, but offer users an easy-to-use and intuitive online look. The online book is fully searchable, either alone or with other ICLE online resources, and includes navigation and finding aids. The book’s homepage includes an expandable table of contents (click on the +) that leads to chapters and sections. It prominently displays the currency date with an explanation. It allows users to search the whole book. Once in a chapter (**Chapter 4** illustrates all the features), the top grid links to major book sections and the forms. The “red pencil” icon calls attention to the summary of changes. Navigation links appear throughout the text.

Finding aids. Citations link to full-text primary law. The summary of changes links to sections incorporating changes. Those sections are tagged with the “red pencil” icon, and link back to the summary of changes. The chapters list and link to all forms in downloadable format. The book (first page) includes an online index, linked to sections.

Feasibility. The files are in XML format, which allows display of HTML without conversion. We use the same files to print the supplement, using FrameMaker as an intermediary for print.

Response; cost effective method. Users love the online book features, in particular the primary law and the continual updates. Further, producing both formats from the same file is cost-effective and has reduced our time to print. Since July 2005, we’ve sold about 100 firm subscriptions to *Michigan Civil Procedure Online* as a separate product while retaining over 900 print subscriptions. Starting in the fall, when we have over 35 books online, we’ll offer subscriptions to the whole “ICLE Online Library.”

Use of Technology Category	TITLE	SIZE of Organization	ORGANIZATION / Contact Person
AWARD FOR PROFESSIONAL EXCELLENCE	ICLE's EVE: Easy-View Editorial Environment	56.5	The Institute of Continuing Legal Education 1020 Green St. Ann Arbor, MI 48109 Yvette Snavelly (734)936-4268 yvetteh@icle.law.umich.edu
AWARD FOR OUTSTANDING ACHIEVEMENT	Ten Minute Mentor	48	State Bar of Texas – TexasBarCLE 1414 Colorado St. Austin, TX 78701 Martin Chait (800) 204-2222 x2056 mchait@texasbar.com
AWARD FOR OUTSTANDING ACHIEVEMENT	Fillable Forms Bank	90	State Bar of Wisconsin CLE Books Division 5302 Eastpark Blvd. Madison, WI 53718 Judi Knight (800) 444-9404 x6141 jknight@wisbar.org

Best Use of Technology

ICLE's EVE: Easy-View Editorial Environment

EVE is a web-based editorial environment developed within ICLE's Intranet that has, more than any other technology we have implemented, helped shift our focus from annually printed products to weekly updated content that can be used in print or online.

Developed in-house by our small tech staff, it has had a major impact on our ability to execute our strategic focus of creating online content that is continually updated and sold on subscription. It has been the bridge that allows us to shed the mindset of writing and editing one book at a time and, instead, adopt a mindset of developing content that can be updated, reused, and pulled into any number of print and online products as appropriate.

At last, our editorial specialists, from legal editors to copy editors, are working and developing content, rather than updating individual books--and they see the effect of their work instantly in any given book in our collection.

The time savings have been dramatic. We have taken a 6-week print production schedule for a book and dropped it to 2 weeks.

The quality of our online content is excellent. We update our entire collection every week. Our customers see the new content online instantly.

It has, more than any other tool, increased the confidence of the editorial staff. Since starting to work in EVE,

- our legal editors are working more efficiently because they are able to research and update large collections of products at once, rather than one product at a time, as they have in the past;
- our copyeditors can find, review and correct text more quickly across products, reducing the amount of time they spend editing content;
- we are able to provide better quality web products because our editors can immediately see the effect their changes will have for our customers online.

As we built EVE, we made the most of the time and money already invested in developing online products for our customers. We were able to reuse the exact code or, in some cases, make only minor changes to create a powerful intranet-based environment for our staff. This, combined with choosing common web and database programming languages to create our web products, makes the system financially practical and easily manageable by our small development staff. In addition, because we are using very common web technologies, it's easy to outsource the coding if our in-house development resources are not available.

How does our system work?

1. ICLE uses a single source for web and print products

ICLE's content is XML-based, which allows us to use a single source file for both print and web products. For example, we can use the same file to create an online chapter and a printed chapter for our books. Because we use a single source for publishing our content, when we make a change to our web products, we are also updating the content of our printed books. This saves us time by combining our print and web content updating processes. In addition, because our content is structured, we can easily pull out pieces, e.g., citations, author notes or cross references, that need to be reviewed as the law changes.

2. ICLE's editorial environment simulates the customer's view

ICLE's editors review and revise content from EVE. EVE looks and functions like our online book products, creating a familiar and comfortable working environment for our editors. Along with making it easier to check the quality of our content, this view helps keep our online customers' needs in sight and helps us shift our focus from annually printed products to weekly updated online content.

3. Customized tools help identify where corrections are needed in our content and create our products

ICLE's editors prefer working in EVE because it provides the tools they need to continually update our content and create our products. Examples of tools include:

- *Recently Released Orders:* This tool takes advantage of our XML-based collection of Michigan case law. It cross references court orders released each week with the cases cited in our books. The result is a list of orders, the cases they affect, and where that citation appears in our books.
- *Tables of authorities:* Copyeditors and legal editors can create a list of citations and cases used throughout our books at any time. This is used to quickly check for accuracy, check the structure of the content, and find where citations are used throughout the book.
- *Content checking tools:* This series of tools allows editors to pull out the tagged content that needs to be reviewed regularly. For example, our cross reference tool allows editors to see what cross references are included in a chapter as well as which chapters reference the one they are viewing. Similar tools help find incomplete case citations, broken urls and names and addresses of organizations that need to be confirmed.
- *Change tracking tools:* Copyeditors and legal editors can create and view a summary of changes or author notes to pinpoint where changes have been made throughout the text.
- *Search:* Editors can search a single book or an entire collection to find the topic they're looking for.
- *Dynamic page views:* Any change made to our content can be viewed immediately in EVE. This allows staff to produce a higher quality file from the very beginning, which reduces errors and time spent in proofing processes down the road.
- *Print product tools:* Copyeditors can easily assemble files as needed to create our print and disk products, e.g., pulling all the forms together for a disk product, pulling small files together to create a larger chapter or eliminating text from a collection of files to produce a smaller chapter.

4. Step-by-step documentation is accessible and updatable online

EVE provides all the documentation our editors need to create and update our XML files. The documentation is available online, so everyone has access to the most current instructions. The documentation is also editable from EVE, making it exceptionally easy to maintain.

5. This environment is scalable, expandable and affordable

EVE was designed to work with our standard content. As long as the content follows one of our typical formats (a large percentage does), it can be added to this environment quickly and with no additional development. It works as well for 1 book as it does for our goal of 40+. In addition, because this environment was developed using non-proprietary and very standard web development technologies (xml, xslt, asp/asp.net), it can be easily expanded to accommodate new types of products and features.

We're finding that we can minimize the amount of development time needed to create this environment because, in many cases, we can simply reuse the code we already wrote for our online products. Because we are using common programming languages, we can effectively use our in-house resources to add to and maintain this system. The basic languages we chose to use do not require an in-house "expert," in fact, development of new tools can easily be assigned to any one of several staff members with basic programming experience or outsourced if necessary.

Screenshots attached

Because EVE was created to work on our intranet and allows access to our production files and database content, unfortunately, we can't provide usernames and passwords for you to try it yourself. Please see the attached screenshots to get a feel for how the system works.

State Bar of Texas TexasBarCLE

Ten Minute Mentor

Project Description

Description of Project

On March 8, 2005, TexasBarCLE, in partnership with the Texas Young Lawyers Association (TYLA), launched a new service on TexasBarCLE.com – *Ten Minute Mentor*. The *Mentor* is an ongoing online collection of instructional video presentations from leading lawyers in their areas of expertise. Each presentation is short (around ten minutes or less), practical, and free. We currently offer over 200 presentations in thirty topic categories. With rare exception, there are no written materials associated with these short segments. The service is available at www.TenMinuteMentor.com.

The list of videos is searchable by keyword and indexed by speaker and topic category. After viewing a topic, users can evaluate the presentation on a simple scale of one to five stars. They are then directed by links to additional TexasBarCLE offerings in that subject area. (No links appear if there are no other seminars or online classes in that subject area.)

All the presentations were taped either at our in-house studio or on site at bar-related meetings. All the segments (with one exception) were originally shot for the *Mentor* – no segments were culled from longer speeches from previously recorded seminars.

Texas is a mandatory MCLE state with a fifteen hour annual requirement. Ten of those hours must be participatory in nature; five may be self-study. Viewing *Ten Minute Mentor* segments qualifies for MCLE self-study credit only. (Our *Online Classroom* presentations, which must be purchased, qualify for participatory credit because registrants are required to enter a discussion forum before they can claim credit.)

Meeting of Criteria

This new service helps achieve our goal of bringing quality CLE, in the form of the wisdom of mentors, to as wide an audience as possible, all free of charge. The first e-mail blast announcing *Ten Minute Mentor* was sent on March 15, 2005. By the end of the next day, this new service attracted 3,253 unique visitors. On average, the site is visited by 127 unique users each weekday and 63 each weekend day, for an average of 3,646 unique visitors a month. We believe these numbers will rise with more cross-promotion in our seminar brochures and e-mail blasts.

The infrastructure for implementing this new service was already in place. For the last several years on our website, we have been streaming presentations recorded at our live programs, selling them in the *Online Classroom*. Therefore, we were able to leverage existing coding at very little expense to bring this service to our users; the website development and financial costs were minimal. The cost of hosting these short video segments was already covered under our existing contract with our hosting service. Our video crew scheduled the tapings during studio downtime or during gaps between scheduled tapings of live seminars. Twenty five segments are captured during a typical taping session.

Because the segments are short and do not qualify for MCLE participatory credit, there has been no noticeable impact on TexasBarCLE's revenue stream. Indeed, our logical conclusion is that our revenues have probably been enhanced somewhat by the links to similar seminars and online classes found at the bottom of the evaluation page to which the user is automatically taken after viewing a segment.

The idea for this project resulted from a discussion between the president of the Texas Young Lawyers Association (TYLA) and the TexasBarCLE staff. TYLA volunteers (young, ambitious, and full of energy) are primarily responsible for choosing the topics and recruiting the volunteer speakers. (Speakers are not reimbursed for any expenses.) Because of the project's success and recognition, TYLA intends to expand the number of segments each year. TexasBarCLE also adds topics to fulfill specific needs. One example of this that TexasBarCLE is especially proud of was our quick response to the Hurricane Katrina disaster: Within a two-week period, we organized and added twenty four new segments on disaster response for attorneys. Links to the *Mentor* were then added to the websites of the Louisiana, Mississippi, and Alabama bar associations.

We believe *Ten Minute Mentor* is deserving of an "ACLEA Best" award because of the way we leveraged both our existing technology and our relationship with another bar-affiliated organization to bring free of charge to our membership (and attorneys in other states) the practical wisdom and expertise of our leading practitioners.

Instructions for Viewing Entry

Go to <http://www.TenMinuteMentor.com>

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The State Bar of Wisconsin Fillable Forms Bank is an online collection of practice forms, checklists, and sample language documents, organized into practice-area libraries. The Bank, which will eventually offer at least 10 practice-area libraries, currently offers two complete libraries: Real Estate and Criminal Law. [WisBar Forms bank](#)

The Forms Bank content consists of hundreds of mostly author-drafted and professionally edited documents compiled from State Bar of Wisconsin CLE Books publications. These documents have been time tested, long trusted by Wisconsin's attorneys, and go far beyond—in complexity, accuracy, and reliability—the generic templates available through commercial forms providers and other sources. The forms are designed by Wisconsin's attorneys for use by Wisconsin's attorneys. They are intended to enhance the quality and efficiency of law practice in Wisconsin. The Forms Bank is not intended to replace any court mandated or official forms, nor is it intended to be a consumer resource for pro se use.

Forms are available for purchase either individually (for one-time use) or by annual subscription to practice-area libraries. While forms are downloadable, subscribers are encouraged to access their forms directly via the web to ensure that they are using the Bank's most current version of the form. Purchasers of individual forms are e-mailed a compressed file containing the form in each format in which that form is available.

Chosen to meet the educational objectives

For several years, formal and informal feedback from State Bar of Wisconsin members revealed that our members want forms. The Bar sought to respond to this need and carefully considered the options and potential ramifications. There were several questions that needed to be answered in the development process: What should the delivery mode be—web or CD? In what format should we offer the forms? How do we expect that the forms will be used, and how should they be produced to offer the greatest utility within our staffing and budgetary constraints? Who will produce the forms?

We hired an LTE project coordinator to research and help us evaluate our options and coordinate the early stages of development. Our LTE was an experienced law-firm law librarian who also had considerable experience with internet research and web design. Through her experience, she had considerable knowledge about how lawyers search for information and practice tools, the ways in which they use those tools, and the types and formats of forms and other resources that are generally available. Applying this information, our project coordinator researched extensively the types of forms products available through other sources, the technologies that were available for creating automated forms, and options for outsourcing forms production versus doing it in-house.

In deliberating over formats, we realized that lawyers would use different documents differently, depending on the substantive requirements and the nature of the form itself. Some forms would best be designed as fill-in-the-blank. Others required that they be modifiable. Taking this essential need into account, along with our goal of making the forms usable by most of our members, regardless of their office technologies, we ultimately decided on offering the forms in four formats: two unlocked formats—Microsoft® Word and WordPerfect®; and two locked formats—Adobe® PDF and OmniForm® Mailable Filler. Most of the forms are provided in all four formats. Where only selected formats are offered, it is because the intended use of the particular document requires either a locked or unlocked form, making the availability of the other style unnecessary or potentially confusing to the end user. See, e.g. (log in to access forms): [WisBar | Forms bank](#)

The unlocked formats allow the user to change, add, move, or delete text. The locked formats allow the user to conveniently tab through and enter data into set fields, while leaving the text and overall formatting of the form unchanged. For most documents, the user has the option of choosing which format will work best in the particular situation. A forms purchase gives the user access to all the formats available. And the FAQs offer users guidance on choosing the appropriate format. [WisBar | Fillable Forms Bank Frequently Asked Questions](#)

Applying the technology & developing the product

After weighing our options for outsourcing versus producing forms in-house, and evaluating the degree of complexity of the work involved, we decided to produce the forms in-house, and assigned the task of forms production to CLE Books production staff.

Creating the delivery environment was an interdepartmental effort. The Bar's in-house web design team worked very closely with the project coordinator and CLE Books legal editors to design web page features, navigation, and informational resources that would provide users with information about the product generally, as well as descriptions of the individual forms available via the Bank. The Bar's IS team, working closely with CLE management and customer service staff, integrated various technologies—the forms Microsoft® Office Access 2003 database, iMIS®, our product and order management software, and our shopping cart system—to develop the purchasing and order fulfillment model that enables the most convenient purchasing options and immediate access. [WisBar | Fillable Forms Bank - Purchasing information](#)

Usability testing involving both internal and external testers ensured that our product and ordering system were properly functioning and ready for launch in December 2005.

Achieving our objectives

Our goal in creating the Fillable Forms Bank was to enhance the quality and efficiency of law practice in Wisconsin by offering attorneys quick, convenient access to high quality documents whenever and wherever it was needed. We wanted to use a platform that would allow us to add forms and update existing forms with minimal delay and disruption to ensure that our members could access the best and most current content available. Finally, we wanted the forms to be widely compatible with an array of technologies so that we could serve the most members possible. We believe that we are meeting those objectives with this product.

Reception by the target audience or market

The Bank launched in mid December with one library, the Real Estate Enhanced Library. The Criminal Law library was added in late January. As of the third week in February, the Bank has generated nearly \$20,000 in subscriptions and individual-form sales, with most of the purchases being library subscriptions at the rate of \$69.95 or \$79.95. This figure exceeded our projections for early sales. So far, we have promoted the Bank through brochures, e-mail ads, newsletter articles, and of course, via the State Bar of Wisconsin website, www.wisbar.org.

Effective, practical use of available Bar resources; value for the membership and the organization

The development of the Fillable Forms Bank made effective use of the resources available to the Bar, beginning with the content, which had been previously developed and published by the Bar. With the exception of OmniForm, each technological component of the Bank had already been part of the Bar's existing technology. Only OmniForm had to be purchased. Scansoft (now Nuance), the owners of OmniForm, typically sell OmniForm on a per end-user-license basis. This would have been prohibitive to the Bar given the sales we projected; however we were able to negotiate an excellent flat annual licensing fee for the software, which has enabled us to offer this format to an unlimited number of end-users for a very reasonable rate. Staffing has been the greatest expense of the project. However, we have been able to keep those costs manageable through in-house development, utilizing the skills of our own experienced professional production and IS staff. The end result has been a product that we have been able to offer to our members for a low price—when you consider the value of the content and convenience—that is demonstrating popularity, through sales, even in the first two months of its availability.