

AGENDA FOR JANUARY 17, 2024
MEETING OF THE CLE COMMITTEE
OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR
12:00 PM – 1:00 PM CORAL B&C

I. WELCOME AND INTRODUCTIONS

Hon. Caryl E. Delano, Judicial Chair
Luis E. Rivera, Chair
Kathleen DiSanto, First Vice Chair
Daniel Etlinger, Second Vice Chair

II. OLD BUSINESS

1. Approval of Minutes of September 1, 2023 Meeting (attached as Exhibit A)
2. Review of Mission Statement and Officer Roles (attached as Exhibit B)
3. BLS CLE Diversity policy (attached as Exhibit C)
4. How to Create a CLE Checklist (attached as Exhibit D)
5. CLE committee website

<https://flabizlaw.org/committees-task-forces/standing-committees/continuing-legal-education-committee/>

III. LEADERSHIP VISIT

1. Program Chair Course Development Worksheet (attached as Exhibit E)

IV. NEW BUSINESS

1. Upcoming CLEs

| Date | Event | Sponsor |
|----------------|--|--|
| Feb. 15, 2024 | 40 th Annual Federal Securities Institute | Corporations, Securities, & Financial Services |
| April 11, 2024 | Intellectual Property Symposium | Intellectual Property |

| | | |
|---------------|--|--------------------------------|
| June 21, 2024 | Electronically Stored Information CLE at The Florida Bar Annual Convention | Elec. Disc. & Digital Evidence |
| July 19, 2024 | 2024 Legislative Update | ??? |

2. Recent CLEs/Events:

| Date | Event | Sponsor |
|------------------|--|--|
| Jan. 12, 2022 | Recent legislative changes to service of process bill: a new ball game | Business Litigation |
| Jan. 25, 2023 | Panel Discussion: The Benefits & Pitfalls of Subchapter V | Bankruptcy/UCC |
| Feb. 28, 2023 | Mental Health First Aid: Skills and Strategies for Handling Everyday Emotions and Stress | N/A |
| Mar. 2 - 3, 2023 | 39th Annual Federal Securities Institute | Corporations |
| April 12, 2023 | A.B.C. (Fla. Stat. §727): The State Court Alternative to Bankruptcy Court | Bankruptcy/UCC |
| April 19, 2023 | Practices, Procedures & Professionalism: Bankruptcy Judges of the Orlando Division of the Middle District of Florida | Bankruptcy/UCC |
| May 2, 2023 | Mental Health First Aid CLE Series- Mental Health Issues in Those Around Us | N/A |
| June 22, 2023 | The New UCC Article 12: Why, When and What Does It Do? | Bankruptcy/UCC |
| June 23, 2023 | Practical Preservation, Collection and Use of ESI and Digital Evidence During Litigation and Trial Seminar | Elec. Disc. & Digital Evidence |
| July 18, 2023 | Mental Health First Aid CLE Series- Dealing with Difficult Clients | N/A |
| Sept. 1, 2023 | Legislative Update | Business Litigation |
| Sept. 1, 2023 | Inside Information: Understanding Data Privacy Legal Protections for U.S. Consumers & Employees | Computer Law & Tech. |
| Sept. 1, 2023 | Discovery in Bankruptcy: from Contested Matters to Adversary Proceedings | Bankruptcy Judicial Liaison |
| Sept. 1, 2023 | Building Your Career: From Resume to First Chair & Beyond | Scholars & Fellows |
| Sept. 2, 2023 | Updates from a Forensic Accountant & Valuation Perspective: the Surfside Building Collapse & Others | Corporations, Securities, & Financial Services |
| Sept. 2, 2023 | Litigating Confirmation Issues in a Sub V Case: Fair and Equitable, Best Interest Test, and Feasibility | Bankruptcy/UCC |
| Sept. 2, 2023 | Business Court Roundtable | Business Litigation |

| | | |
|---------------|---|-----------------------|
| Sept. 2, 2023 | Show Me the Money! An Overview of Economic Damages Calculations | Business Litigation |
| Sept. 2, 2023 | Beyond the Code: Mastering the Art of Software Licensing Strategies | Intellectual Property |
| Oct. 26, 2023 | Webinar: From Business Litigator to Problem Solver | Business Litigation |
| Nov. 2, 2023 | The Judge Michael G. Williamson View from the Florida Bankruptcy Bench- Tampa | Bankruptcy/UCC |
| Nov. 3, 2023 | The Judge Michael G. Williamson View from the Florida Bankruptcy Bench- Miami | Bankruptcy/UCC |

REMINDER! Except for health and wellness programing, all BLE CLE's should be offered *for a fee* on the InReach platform.

3. Florida Bar Journal Pipeline: Upcoming articles

| Fla Bar Issue | Title / Author | Status | Deadline |
|------------------------|--|-----------------------|-----------|
| January/February 2024 | <i>Protecting Interests or Hindering Real Estate Deals? Impact of a Lis Pendens When Selling Real Property in Florida</i> (Jocelyne Macelloni) | Pending Editing (KLD) | Nov. 1 |
| March/ April 2024 | <i>What Every Business Lawyer Needs To Know About Captive Insurance; and Why It Matters in Today's Hardening Insurance Market</i> (Amanda Luby) | Pending Editing (DE) | January 1 |
| May/June 2024 | <i>corporate transparency act</i> (Jonathan Hayes) | Pending (LER) | March 1 |
| July/August 2024 | <i>Bankruptcy and Indubitable Equivalent Value - When is a Prior Value Determination or Stipulated Value not the Value of the Business?</i> (Peter Gampel) | Pending Editing (KLD) | May 1 |
| September/October 2024 | Need Article | Need article | July 1 |
| November/December 2024 | Need Article | Need article | Sept. 1 |
| January/February 2025 | Need Article | Need article | Nov. 1 |

4. Florida Bar Journal Pipeline- published articles

| Fla Bar Issue | Title / Author | Sponsor |
|------------------------|---|---------------------|
| November/December 2022 | Should <i>Durham v. Ocwen</i> Affect the Interpretation of “Assignee” Under Florida’s Version of Article 9 of the Uniform Commercial Code? (Juan Mendoza) | Bankruptcy/UCC |
| January/February 2023 | Subchapter V: A Big Deal for Small Business (Robert A. Stok, Tuvia Sandler, and Sam Sachs) | Bankruptcy/UCC |
| March/April 2023 | Yours, Mine, And Ours: May a Bankruptcy Court Authorize the Sale of a Co-Owner’s Interest Free and Clear of its Creditors’ Claims? (Daniel Etlinger) | Bankruptcy/UCC |
| May/June 2023 | Recent Legislative Changes to Service of Process: A New Ball Game? (Giacomo Bossa and James B. Murphy, Jr.) | Business Litigation |
| July/August 2023 | Use of the Constructive Knowledge Standard When Evaluating “Evident Partiality” Challenges to Arbitration Awards in Florida (Patricia A. Leonard and Ella A. Shenhav) | Business Litigation |
| September/October 2023 | Crisis Communications and Image Restoration – There’s Insurance for That? (Russell A. Sibley, Jr.) | Business Litigation |
| November/December 2023 | (Mark Wolfson) | Bankruptcy/UCC |

5. Committee Management – Florida Bar Journal Submission Process

| Fla Bar Issue | Article Due to CLE Committee | CLE Committee Editor |
|----------------------|-------------------------------------|-----------------------------|
| November / December | September 1 | Chair |
| January/February | November 1 | Vice-Chair |
| March /April | January 1 | Second Vice-Chair |
| May / June | March 1 | Chair |
| July /August | May 1 | Vice-Chair |
| September / October | July 1 | Second Vice-Chair |

V. OTHER BUSINESS/GOOD OF THE ORDER

**REPORT/MINUTES FOR SEPTEMBER 1, 2023
MEETING OF THE CLE COMMITTEE
OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR**

I. Welcome and Introductions

- a. Luis E. Rivera called the meeting to order at 3:10 p.m.
- b. Chair Rivera welcomed attendees and invited introductions.
- c. Attendees—
 - i. Hon. Caryl E. Delano, Judicial Chair
 - ii. Luis E. Rivera, Chair
 - iii. Kathleen L. DiSanto, First Vice Chair
 - iv. Daniel Etlinger, Second Vice Chair
 - v. Dylan Stone
 - vi. Valeria Angelucci, Vice Chair Corporations, Liaison
 - vii. Todd Jones
 - viii. Joryn Jenkins
 - ix. Utibe Ikpe, Past Chair of CLE Committee, Second Vice Chair of Business Litigation, Liaison

II. Leadership Visit

- a. Welcome and Introductions from Mark Stein. What can Leadership do to help?
- b. Discussion of how to enhance liaison relationships with other committees, personal contact and calls are helpful
- c. Second vice chairs tasked with serving as liaisons to CLE Committee in written descriptions, reminder to be made at Executive Committee

III. Old Business

- a. **Approval of Minutes of June 21, 2023 (Attached as Exhibit A)**
 - i. No objections being made, the minutes were approved without a vote.
- b. **Review of Mission Statement and Officer Roles (Attached as Exhibit B)**
 - i. Chair Rivera presented the mission statement and described the function of the committee and its officers.
- c. **BLS CLE Diversity policy (Attached as Exhibit C)**
- d. **How to Create a CLE Checklist (attached as Exhibit D)**
 - i. The Committee discussed the proposed Checklist.
 - ii. Discussion regarding Zoom versus in person presentations with Todd Jones on real estate and IP issues and lunch learns on accounting issues with Todd Jones of Berkowitz Pollack Brant.

- iii. Past Chair Ikpe initiated discussion regarding role of CLE committee and extent interactions with substantive committees. When a substantive committee wishes to plan a CLE, contact should be made via email with CLE Chairs, section administrator (Cabrail), and Tracey Eller. Chair Rivera explained that CLE Committee will be an information hub, tracking and communicating what CLEs have been previously presented and substantive committee responsible for CLE.

e. CLE Committee Website

<https://flabizlaw.org/committees-task-forces/standing-committees/continuing-legal-education-committee/>

- Prior Chair Ipke and Chair Rivera have communicated with Tracy Eller regarding the following website updates:
 - o Removed “2021 Committee Goal.”
 - o Add Committee Goals going-forward?
 - o Deleted “Join the CLE Committee Listserv”
 - o Need to Update “Planning a Seminar” Section
Replace with new “How to Create a CLE Checklist”
- Chair Rivera to communicate with Cabrail regarding final review and posting of CLE Checklist

f. Report from BLS Leadership Boot Camp

- Chair Rivera made the following report:
 - o Each substantive committee will host 3-5 paid CLEs per year.
 - o The CLE Committee is a resource hub for the Section. The CLE Committee should be involved in planning and organization of every CLE.
 - o Each substantive committee will designate a liaison to the CLE Committee by Executive Council meeting at Annual Retreat

IV. New Business

a. Recent CLEs & Events

Chair Rivera updated the committee on recent CLE events presented by the Business Law Section and its substantive committees—

| Date | Event |
|---------------|--|
| Jan. 12, 2022 | Recent legislative changes to service of process bill: a new ball game |
| Jan. 25, 2023 | Panel Discussion: The Benefits & Pitfalls of Subchapter V |

| | |
|-------------------|--|
| Feb. 28, 2023 | Mental Health First Aid: Skills and Strategies for Handling Everyday Emotions and Stress |
| March 2 – 3, 2023 | 39th Annual Federal Securities Institute |
| April 5, 2023 | IP Roundtable |
| April 12, 2023 | A.B.C. (Fla. Stat. §727): The State Court Alternative to Bankruptcy Court |
| April 19, 2023 | Practices, Procedures & Professionalism: Bankruptcy Judges of the Orlando Division of the Middle District of Florida |
| May 2, 2023 | Mental Health First Aid CLE Series- Mental Health Issues in Those Around Us |
| June 22, 2023 | The New UCC Article 12: Why, When and What Does It Do? |
| June 23, 2023 | Practical Preservation, Collection and Use of ESI and Digital Evidence During Litigation and Trial Seminar |
| July 18, 2023 | Mental Health First Aid CLE Series- Dealing with Difficult Clients |

b. Upcoming CLE Opportunities

- i. Chair Rivera and committee members also discussed upcoming CLE events presented by the Business Law Section and its substantive committees—

| Date | Event | Sponsor |
|---------------|---|--|
| Sept. 1, 2023 | Legislative Update | Business Litigation |
| Sept. 1, 2023 | Inside Information: Understanding Data Privacy Legal Protections for U.S. Consumers & Employees | Computer Law & Tech. |
| Sept. 1, 2023 | Discovery in Bankruptcy: from Contested Matters to Adversary Proceedings | Bankruptcy Judicial Liaison |
| Sept. 1, 2023 | Building Your Career: From Resume to First Chair & Beyond | |
| Sept. 2, 2023 | Updates from a Forensic Accountant & Valuation Perspective: the Surfside Building Collapse & Others | Corporations, Securities, & Financial Services |
| Sept. 2, 2023 | Litigating Confirmation Issues in a Sub V Case: Fair and Equitable, Best Interest Test, and Feasibility | Bankruptcy/UCC |
| Sept. 2, 2023 | Business Court Roundtable | |
| Sept. 2, 2023 | Show Me the Money! An Overview of Economic Damages Calculations | Business Litigation |
| Sept. 2, 2023 | Beyond the Code: Mastering the Art of Software Licensing Strategies | IP Committee |
| Oct. 26, 2023 | Webinar: from Business Litigator to Problem Solver | Business Litigation |

| | | |
|---------------|---|--|
| Nov. 2, 2023 | The Judge Michael G. Williamson View from the Florida Bankruptcy Bench- Tampa | |
| Nov. 3, 2023 | The Judge Michael G. Williamson View from the Florida Bankruptcy Bench- Miami | |
| Feb. 11, 2024 | 40 th Annual Federal Securities Institute | Corporations, Securities, & Financial Services |

c. ***The Florida Bar Journal Pipeline: Published Articles***

Chair Rivera updated the committee on recent articles published in *The Florida Bar Journal*—

| Fla Bar Issue | Title / Author | Sponsor |
|------------------------|---|---------------------|
| November/December 2022 | Should <i>Durham v. Ocwen</i> Affect the Interpretation of “Assigned” Under Florida’s Version of Article 9 of the Uniform Commercial Code? (Juan Mendoza) | Bankruptcy/UCC |
| January/February 2023 | Subchapter V: A Big Deal for Small Business (Robert A. Stok, Tuvia Sandler, and Sam Sachs) | Bankruptcy/UCC |
| March/April 2023 | Yours, Mine, And Ours: May a Bankruptcy Court Authorize the Sale of a Co-Owner’s Interest Free and Clear of its Creditors’ Claims? (Daniel Etlinger) | Bankruptcy/UCC |
| May/June 2023 | Recent Legislative Changes to Service of Process: A New Ball Game? (Giacomo Bossa and James B. Murphy, Jr.) | Business Litigation |
| July/August 2023 | Use of the Constructive Knowledge Standard When Evaluating “Evident Partiality” Challenges to Arbitration Awards in Florida (Patricia A. Leonard and Ella A. Shenhav) | Business Litigation |
| September/October 2023 | Crisis Communications and Image Restoration – There’s Insurance for That? (Russell A. Sibley, Jr.) | Business Litigation |

d. ***The Florida Bar Journal Pipeline: Upcoming Articles***

Chair Rivera updated the committee and substantive committee liaisons on upcoming opportunities for publication in *The Florida Bar Journal*—

| Fla Bar Issue | Title / Author | Status | Deadline |
|------------------------|---|--------------|-----------|
| November/December 2023 | Mark Wolfson | Pending | Sept. 1 |
| January/February 2024 | Jocelyne Macelloni, <i>Protecting Interests or Hindering Real Estate Deals?</i> | Pending | Nov. 1 |
| March/ April 2024 | N/A | Need article | January 1 |
| May/June 2024 | N/A | Need article | March 1 |
| July/August 2024 | N/A | Need article | May 1 |
| September/October 2024 | N/A | Need article | July 1 |

A call was made to remind for liaisons to actively solicit articles at their substantive committees. Todd Jones (todd.jones@realsadvice.com) and Dylan Stone are interested submitting articles.

e. **Committee Management – *The Florida Bar Journal* Submission Process**

Judicial Chair Delano and Chair Rivera provided overview of guidelines available on *The Florida Bar Journal* Articles Guidelines.

<https://www.floridabar.org/static/journal-submission-guidelines/#:~:text=Articles%20submitted%20for%20possible%20publication,be%20provided%20in%20the%20text.>

V. **Other Business/ Good of the Order**

VI. **Adjournment**

- a. The meeting was adjourned at 3:54 p.m.

FLORIDA BAR BUSINESS LAW SECTION- CLE COMMITTEE

Mission Statement

The CLE Committee supports the substantive committees of the Business Law Section in their efforts to provide continuing legal education programs and articles for The Florida Bar Journal. The CLE Committee serves as a liaison between the substantive committees, their designated representatives, and the Business Law Section Administrator to facilitate the scheduling and marketing of CLE programs and provides editorial oversight for Bar Journal articles.

Officer Roles/ Responsibilities

- Chair:
 - Serves as the primary point of contact for CLE Committee with third parties and coordinates communication with other BLS Committees and BLS leadership
 - Schedules officer and committee meeting as needed to supplement the meetings held during The Florida Bar and BLS conferences
 - Communicates as needed with CLE Committee members between meetings
 - Ensures that all appropriate matters come before the CLE Committee at committee meetings
 - Coordinates the CLE Committee's efforts with respect to BLS members' submissions of articles for publication in The Florida Bar Journal
 - Represents the CLE Committee and reports on its activities at all BLS Executive Council meetings, or arranges for substitute representation if the Chair is unable to attend
- Vice-Chair:
 - Assists the Chair in fulfilling his or her responsibilities
 - Encourages and coordinates the participation of substantive BLS Committees in CLE Committee meetings
 - Takes minutes of all meetings and circulates the minutes to Committee officers
 - Drafts a written report to the Executive Council summarizing the CLE Committee meetings in advance of Executive Council meetings
 - Serves as the Chair at any Committee meeting that the Chair is unable to attend
- Second Vice-Chair:
 - Assists the chair and second vice chair in fulfilling their responsibilities
 - Provides continuity for CLE Committee leadership
- Judicial Chair:
 - Supports the efforts of the Chair, Vice-Chair, and Second Vice-Chair
 - Provides continuity as new BLS members assume leadership positions in the CLE Committee

BUSINESS LAW SECTION DIVERSITY EQUITY AND INCLUSION CLE POLICY

Adopted by The Business Law Section of The Florida Bar on June , 2022

The Business Law Section (“BLS”) supports proactive measures to ensure that individuals from all backgrounds are afforded fair opportunities to participate in CLE programs. All CLE programs sponsored or co-sponsored by the BLS will meet the objectives of the BLS Diversity Committee Strategic Plan to eliminate bias and enhance diversity.

Program organizers will invite and include prospective moderators and faculty members to create CLE panels that meet the objectives of the BLS Diversity Committee Strategic Plan. This includes, among others, moderators, and faculty members from historically underrepresented communities (e.g., racial and ethnic demographic groups/people of color, women, persons with disabilities, and LGBTQ+ individuals).

The Inclusion. Mentoring and Fellowship Committee (“IMF”) will create a subcommittee (the “DEI Subcommittee”), which shall be chaired by the Vice Chair of the IMF Committee and may include representatives from any other BLS committees, subcommittees, task forces and other entities (“BLS Entities”). The DEI Subcommittee shall monitor the BLS’s CLE programming to ensure that BLS Entities conduct CLE programs in accordance with this policy. The DEI Subcommittee will have authority to engage and assist any BLS Entities found not to be in compliance with this policy. Final decisions with respect to BLS Entities conducting CLE programs in accordance with this policy shall rest with the BLS Executive Committee. IMF shall report the DEI Subcommittee’s findings at regularly scheduled meetings of the Executive Council.

The implementation date for this Diversity Equity and Inclusion CLE Policy shall be July 1 , 2022.

BUSINESS LAW SECTION
OF THE FLORIDA BAR

CONTINUING LEGAL EDUCATION COMMITTEE

CLE Planning Event Checklist

Step 1 – What? (Establish Goals and Brainstorm Event Topic)

- ☐ Identify Topic – Current issues that will enhance an “attorneys’ professional competence and skills.” [BLSE Policy 5.01\(a\)\(1\)](#).
- ☐ Review Board of Legal Specialization and Education (BLSE) [Policy 5.01](#)

Step 2 – Contact BLS Leadership and the CLE Committee

- ☐ BLS Program Administrator – [Insert Name and Email Address Here]
- ☐ CLE Committee Chair – Utibe Ikpe uikpe@melandbudwick.com

Step 3 – Who?

- ☐ Identify speakers
 - “An individual or group qualified by practical or academic experience.” [BLSE Policy 5.01\(a\)\(3\)](#).
 - Consider [BLS Diversity Policy](#)

Step 4 – When? (Determine Optimal Date)

- ☐ Avoid similar industry events on the same day/week
- ☐ Clear date against [The Florida Bar Master Calendar](#)

Step 5 – Where? (Identify Venue, Determine Event Technology Needs)

- ☐ In-person, virtual, or hybrid?
- ☐ Virtual or Hybrid – Use InReachCE
 - Offered in after-market library (cost is generally \$40 per CLE hr. to attend)
- ☐ In-person – Identify venues, research pricing, visit potential locations

Step 6 – The “Real” What – [Apply for CLE Accreditation](#)

- ☐ Review BLSE Policy 5.02
- ☐ Create outline, gather bios and submit to BLS Program Administrator to secure BLSE CLE accreditation from BLSE
 - Consider the program level (e.g. basic, intermediate or advanced) and what types of CLE credit are available (e.g., general, ethics, professionalism, substance abuse, mental illness awareness, bias elimination, or technology)
- ☐ [Application for Accreditation](#) due at least 30 days in advance of event. Consider applying [online](#).
 - Resources—
 - [How to Complete the Online Course Accreditation Application](#)
 - [Frequently Asked Questions About the Online Course Accreditation Application Process](#)

Step 5 – Why? (Develop a Marketing Plan)

- ☐ Identify what Florida Bar Sections and Committees could be interested in the program
- ☐ Create marketing plan (emails, social media ,etc.)

Luis E. Rivera

From: Mark Stein <mark@marksteinlaw.com>
Sent: Friday, January 5, 2024 12:55 PM
To: kmurena@dvllp.com; Adina Pollan ; Mdmaland@rvmrlaw.com; Robert Kain; Brian Barakat; Joseph Van de Bogart; Talia Boiangin; Michael B. Bittner; Toni Tsvetanova; Valeria Angelucci (vangelucci@beckerlawyers.com); Darren Spielman (dspielman@conceptlaw.com); Meredith Frank Mendez; Mariane Dorris; Russell Landy (rlandy@dvllp.com); Christopher L. DeCort - Johnson, Cassidy, Newlon & DeCort (cdecort@jclaw.com); Kelly Roberts; Van de Bogart, Katherine G; Juan J. Mendoza; Taylor, Christina; Luis E. Rivera; Kathleen L. DiSanto
Cc: tceller@bellsouth.net; mfarach@mrachek-law.com; SLieb@trenam.com; pvalori@dvllp.com; Yadley, Gregory C.; Douglas A. Bates; Miller, Thomas V; Hopkins, Carly
Subject: Winter Meeting
Attachments: Program Chair Course Development Form.pdf

This message originated outside of GrayRobinson.

Dear Chairs and Vice-Chairs:

Happy new year to everyone.

Please let us know as soon as possible, what, if any AV needs your committee has during the Winter meetings. Unless you tell us differently, the larger committees (Bankruptcy/UCC, Business Litigation, Bankruptcy/Judicial Liaison, IMF/Membership) will have microphones, but no other AV equipment like screens or projectors. If your committee needs any of this additional AV equipment, please let us know asap.

If you are planning to have a CLE at your committee meeting, you need to fill out the attached Program Chair Course Development Worksheet and send it to both Tom Miller TMiller@floridabar.org and Carly Hopkins chopkins@floridabar.org at the Florida Bar to receive CLE credit. Please do this as soon as possible and copy both Luis E. Rivera Luis.Rivera@gray-robinson.com and Kathleen L. DiSanto kdisanto@bushross.com as the Chair and Vice-Chair of CLE.

Thanks in advance.

Wishing everyone a great weekend.

Regards,

Mark E. Stein

Board Certified Intellectual Property Law

Florida Supreme Court Certified Circuit Mediator



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Trademark | Copyright | Patent
Computer and Internet Law | Dispute Resolution

Courage is resistance to fear, mastery of fear – not absence of fear. Mark Twain

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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**.

To Be Completed by Program Chair

Course Title: _____ Course Date: _____

Venue: _____ Location Code (To be filled in by Administrator: _____

Section / Sponsor(s): _____

Course Description:

(450 character limit
including spaces)

Program Chair(s) w/ email address: _____

Recording? Y N Webcast? Y N Lunch Provided? Y N Reception? Y N

To Be Completed by Program Administrator

Who is Recording? (KVI, InReach, etc.) _____

CLE Type: Section Service Section Sponsored Joint Sponsored Special Project

Other Products: DVD CD Course Book: quantity _____

Recurring Program? Yes No

CLE Credit Hours (____ hours of general credit)

Bias Elimination: _____

Professionalism: _____

Ethics: _____

Substance Abuse: _____

Mental Illness Awareness: _____

Technology: _____

Certification Area

Certification Hours

| | |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

Additional Information

COURSE AGENDA DAY 1

Please create the agenda, including the time (start and finish), topics and descriptions, panels, lunches, receptions, and breaks. For 2-day programs use the next page for day 2.

Faculty & Steering Committee:

[illegible]

COURSE AGENDA DAY 2

Please create the agenda, including the time (start and finish), topics and descriptions, panels, lunches, receptions, and breaks.

Faculty & Steering Committee:

[illegible]

SPEAKER MATERIALS

Below is a list of the speaker materials needed from each speaker and/or author. Please check-off the items received.

[illegible]