



Program Planning Guide

EBA Leadership Conference



Tips to Plan an Event

Thank you for volunteering to organize an EBA event. The following is meant to serve as background on how to plan an event for EBA.

EBA Staff Contacts:

EBA Office: 202.223.5625

For Committee events – Marlo Brown-Carpenter, marlo@eba-net.org

For Chapter events – Michele Smith, Michele@eba-net.org

*** ALL event dates MUST be cleared in advance with EBA.

PLEASE NOTE:

Please remember, all events are “EBA Events”, even if hosted by an outside entity (law firm, corporation, university, etc). As such, all EBA pricing and attendance policies apply and any changes/additions to a meeting must *first* be cleared through EBA before going into effect.

SELECT A TOPIC

- Confer and coordinate with other committees and chapters as appropriate
- Determine subject matter and potential speaker(s)
- If topic or speaker may be controversial:
 - Seek balanced presentation
 - Must be clear that EBA does not endorse a position or speaker
- Consider speakers outside the Washington, DC area

SELECT A FORMAT

- EBA encourages committees and chapters to be creative in programming formats and, if possible, include a networking component
- Formats to consider:
 - EBA Energizer- short educational program, typically an hour to a half-day, live and/or conference call or WebEx, in which one or more speakers’ present information on a particular topic or related topics.
 - Networking only event
 - Miscellaneous format – generally these would be half day program with a networking component
- Determine if CLE will be desired (contact Lisa Levine for guidance and additional requirements)

• EBA sets registration pricing **LOGISTICAL CONSIDERATIONS**

Understand Site Needs in Advance

- Meeting room set-up
- Audio/visual

- Teleconference capability
- Will the site provide refreshments/food?
- Speaker needs
- Need a volunteer to do on-site registrations (EBA staff does not attend)
- Name tags – if you need them, EBA will email you a file for you to print tags

MEETING EXPENSES AND REGISTRATION FEES

- Anticipate expenses and determine if host or EBA is paying
 - WebEx or conference call vendor
 - Food/beverage
 - Venue
 - CLE application fees
- Registration fees are determined by the Pricing Event guidelines
- Events are expected to make a minimum 10% profit after expenses
- Seek to defray costs
 - Seek to use law firm/corporate conference rooms free of charge
 - Consider if the site provider will donate food/beverages
 - Host brown-bag style lunches
 - No honorariums or travel is paid for speakers



EBA Program Planning Guide

For recorded and live programs

Thank you for volunteering to plan an EBA event! EBA encourages program hosts to conduct programs that are worthy of recording and making available for sale (with corresponding CLE credit whenever possible) to the broader legal community via its partnership with Thomson Reuters West LegalEdcenter. This guide is designed to provide the materials necessary to ensure programs are successfully recorded and presented.

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Please direct any committee related event questions to Marlo Carpenter-Brown at marlo@eba-net.org and chapter related event questions to Michele Smith at michele@eba-net.org

PLANNING TASKS & DEADLINES

*For Committee events: Submit to Marlo Brown at marlo@eba-net.org by the date indicated
For Chapter events: Submit to Michele Smith at michele@eba-net.org*

Deadline	Tasks
60 days pre-event	<p>Confirm the date of the event with EBA. Complete and submit the <u>Program Details Form</u>.</p> <ul style="list-style-type: none"> • Include a compelling and descriptive summary of the program. If possible, include an agenda and/or a list of learning objectives. • If the program is more than 2 hours, provide a timed agenda.
45 days pre-event	<ul style="list-style-type: none"> • Submit draft program materials to EBA • Submit a short bio of each Speaker (consider using speakers outside of DC) • Provide Speaker(s) the <u>Speaker Participation and Release</u> and assign 5-day deadline.
10 days pre-event	<ul style="list-style-type: none"> • Collect and forward Speaker Participation and Release forms to EBA. • Provide Speakers the <u>Speaker Tip Sheet</u>.
3 days pre-event	<ul style="list-style-type: none"> • If the event is live, confirm with Speaker(s) how they would like to handle questions. • If the event is live, then assign a Moderator and provide the <u>Moderator Instruction Sheet</u>.
3 days pre-event	<ul style="list-style-type: none"> • Submit final versions of all program materials in one of the following formats (15 Mb max): <ul style="list-style-type: none"> ○ MS Word ○ PowerPoint • Confirm Technology <ul style="list-style-type: none"> ○ Test the audio well in advance to resolve sound system and feedback issues. It is best to use a wired or wireless lavalier microphone if possible. Its use will enable for even sound quality throughout movement of the speaker. The use of multiple wireless lavalier microphones will likely create feedback and is not recommended.
One hour pre-event	<p>If West records the event, then a West representative will call to connect 30-60 minutes prior to program start time. All equipment should be set up and ready to go a minimum of 60 minutes prior to the program.</p>
Event	<p>Have fun!</p>
1 day post-event	<p>If West did not record the event, then the recording should be sent via CD or uploaded to EBA's dropbox account (please contact Marlo to obtain dropbox details).</p>



EBA Program Description Form
Must be completed and sent with calendar request to
Marlo Brown-Carpenter at EBA.

marlo@eba-net.org

Name Contact of Volunteer Coordinator:

Title of program*:

**Please keep the title pithy.*

Type of program: Luncheon Reception Teleconference Webcast All-Day Program
 Other, Describe:

Date: _____ **Time-Start End:** _____ **(ET)**

Location:

[Include Host firm's name and room capacity (for internal use only)]

CLE Credit: Do you anticipate requesting CLE for this program:

- Yes, I would like EBA to apply for CLE Indicate which states:
- No CLE
- I would like help evaluating if this program is worthy of CLE

Recording Program: EBA's goal is to record all educational programs for our On-Demand Library. as long as the program has a shelf life, and is of interest to a large audience. Generally programs that are selected for recording are also approved for CLE credits. *To record a program requires significant expense to EBA and will require a more planning time (up to weeks) for the speakers.*

- Yes, I would like EBA to consider recording this program**
- No, this program is not worthy of recording.**

Brief Description of program to use in promotional e-mails/materials:

Presented by which EBA Committee(s) or Chapter:

Co-Marketing: Would you like EBA to invite other bar associations or industry organizations to co-market this program to their membership? If so, which organizations? (Please note, all invitations to co-market programs must be approved by the EBA Joint Enterprise Committee):

Please list the program moderator and speakers. Include Name, Title, Organization or Company for each speaker/moderator:

Moderator:

Panelists:

PLEASE NOTE: the EBA generally does not provide travel reimbursement for speakers or pay speaker fees.

Other Meeting Specifics:

Meeting has financial sponsors (include list of sponsors)

Program includes a hosted lunch, paid for by:

Program includes a hosted Networking reception immediately following the meeting, paid for by:

Location Details: Provide specific details regarding parking, Metro, access to the location:

Media: It is EBA's goal to always allow media. Is there any reason media cannot attend this event? YES NO

If yes, please describe:

Questions for the Panelists:

[Optional] If you would like people to ask questions in advance, complete this info:

Please send any questions for the panelists to:

Name: _____ at [email address] _____ no later than _____

WHO IS THE AUDIENCE?:

Please indicate the **PRIMARY** audience for this program:

Energy Attorney Energy Professional Consultant Student Other:

Number of years experience in energy:

1-4 years 5-10 years 10 or more years

ENERGY F ELD(S) OF PRACT CE Check all that apply (F Federal, S State):

ELECTR C: F S GAS: F S HYDRO: F S TRANSACT ONAL: F S F NANCE: F S NUCLEAR: F S

O L: F S OTHER: F S (provide details)

Please indicate if this program would appeal to a specific chapter geographic area:

Houston Rocky Mountain Midwest Southern New Orleans estern Northeast Canada

Other:

EBA staff will insert registration rates, payment and cancellation details into the marketing material.

As a reminder, the EBA Board has set an approved Program Fee Guidelines:

The EBA Board has adopted a minimum fee structure for EBA events organized at both the national and chapter levels. The fee structures do not apply to either National or Chapter annual meetings. Those excluded events shall continue to be priced individually with prior approval from the EBA Board. Also, lower fees can be proposed for current students and government employees.

RETURN COMPLETED FORM TO MARLO BROWN-CARPENTER AT MARLO@EBA-NET.ORG

SPEAKER PARTICIPATION AGREEMENT AND RELEASE

Event Name:

Date:

Location:

Miscellaneous:

I grant the Energy Bar Association and Thomson Reuters West LegalEdcenter the right to record, stream, film, copy, and photograph my Presentation, and all accompanying materials, in connection with my Presentation at the above referenced Event. I also grant the Energy Bar Association and Thomson Reuters West LegalEdcenter, its successors and assigns, a non-revocable, royalty-free right to exhibit, publicly perform, distribute, broadcast, edit, translate, transmit, or otherwise disseminate the presentation, in whole or in part, throughout the world, in any and all media now known or hereafter developed, for up to three (3) years from the date of the Event.

I represent and warrant that: (i) I have the full power and authority to grant the rights and releases set forth in this Agreement; (ii) the Presentation is wholly original to me, in the public domain, or I have acquired the necessary rights; (iii) the Presentation does not contain any materials which are obscene, defamatory, libelous, or slanderous, or which violate any right of privacy or other proprietary rights of any other person or entity

By signing below I am acknowledging my agreement with the terms of this Agreement.

AGREED AND ACCEPTED:

Signature:

Printed

Name:

Address:

City:

State:

Zip:

SPEAKER/ MODERATOR TIP SHEET

Thank you for volunteering your time to present for EBA! Please abide the following guidelines to ensure the successful recording of your presentation.

- Every speaker **must** use a microphone (no speakerphones!).
- Speak *into* the microphone be conscious of leaning back and moving around.
- Please keep cell phones far away from microphones.
- MODERATORS: At the beginning and end of the program announce and welcome people to the “Energy Bar Association program on (title of program)”
- If the audience does not have its own microphone, please repeat any questions prior to responding.
- If you use a PowerPoint or other presentation materials, then periodically identify what slide or page number that you are on.
- Eliminate background noise. Pause in the event of a disturbance, such as a passing siren.
- If there are both live and online audiences, encourage the online audience to ask questions.

Additional Requirements for CLE Programs:

- Provide at least 10 pages of written material (slides, documents, etc.) per hour of programming. The materials should largely be original works prepared specifically for the program.
- The program must last at least sixty (60) minutes.
- Please send all CLE materials to Lisa Levine at llevine@eba-net.org.

MODERATOR INSTRUCTION SHEET FOR WEST-RECORDED EVENTS

Thank you for volunteering your time to moderate the EBA Program: [INSERT TITLE OF PROGRAM], which will occur on [INSERT DATE], 2016 at [INSERT TIME] Eastern, at [INSERT LOCATION].

1. Please call the following number thirty (30) minutes prior to the scheduled start of the program to start the streaming process:

Dial-in number is: [ENTER]

The passcode is: [ENTER]

You will hear music until the West team member joins the call and commences streaming.

2. Before the webcast, pull up this link to the Question Board:

[ENTER URL (supplied by West 1-3 days prior to Event)]

Please make sure you have that screen with the question link in front of you. Any questions posted by your listeners will appear here. You should refresh it every few minutes because questions will be posted in real time. Important notes about the question link:

*Occasionally, partial questions will appear. Don't worry about this; the questioner will retype and resubmit the question.

*Sometimes when participants have technical problems, they will post these problems through the question link. You can ignore this. West representatives monitor the question link for these comments and will contact them directly with the telephone number for technical support.

A West representative will send an email via this link to alert you of any issues (e.g., a Speaker is too soft, there is too much background noise, etc.)

3. At the start time of the event, a West team member will start the webcast and introduce all of the speakers by name, title, and professional affiliation. You should decide in advance how you will begin and moderate, and how you will allocate questions as they come in from the audience.
4. The webcast **runs until [TIME] Eastern**. Please do not end the webcast before this time or it will adversely affect the CLE credit that attendees and speakers will receive for the event.
5. At the appointed end time of the webcast, it will be up to the panelists to close out the program. There is no hard stop and you will not be automatically cut off. Thank the audience for tuning in and hang up to terminate the program.