The Corporate Counsel Sections Guide to Hosting a CLE (Virtual)

1. Decide on topic
2. Coordinate with speaker(s) on date and time of CLE. Plan on a minimum of 30 days lead time (e.g., if you want to hold a CLE in mid-Feb. plan on having topic, speakers and date and time firmed up by mid-Jan). We typically stay away from Mondays and Fridays for CLEs. We often schedule them from noon – 1 pm, but sometimes a breakfast CLE is a good draw and change of pace for attendees.
3. Once topic, speakers, and date and time are confirmed, draft a proposed marketing notice. The notice should contain the title and a brief synopsis of the CLE, the speaker(s) and bio(s) and date and time and, if in-person, location (See Exhibit A for a sample notice).
4. Once the marketing proposal is drafted, contact the Oregon State Bar CLE coordinator and let them know what other sections in addition to the Corporate Counsel Section we want to send the notice to (e.g., intellectual property, business litigation). If the event is virtual and the section is hosting it, select the "registration only" service (with this service option the bar will handle the registration process, but the section will be in charge of hosting the virtual event).
5. If applicable work with the speakers to fine-tune the event and gather written materials.
6. Submit the proposed CLE to the Oregon State Bar for accreditation (see Exhibit B for a sample of the form).
7. One or two days before the event, do a sound, video, and presentation check using the virtual platform. It is usually helpful for people to use a headset, but sometimes audio is OK without one, particularly if it is a single speaker rather than a panel. If the speaker is using slides, coordinate who will be running the slides during the presentation, the speaker or the host. Also, discuss the use of video and test it.
8. The day before the event the Oregon State Bar will provide an Excel spreadsheet with the first and last name of the registrant, bar #, and email address. This list is used to BCC the registrants with the link to the virtual meeting.

Exhibit A: Sample Notice

CLE ONLINE

Mark your calendars: The Corporate Counsel Section will host a free CLE online

*****March 9, 2022*****

Topic: Mask On, Mask Off – Implementing Company-Wide COVID Polices in an Ever-Changing Landscape

Karen O'Connor, a partner in the Labor and Employment group at Stoel Rives LLP; Kat Rosenbaum, Chief Litigation Counsel & Claims Manager for NW Natural; and Sarah Ewing, Senior Deputy General Counsel for Tri-Met will present a free one-hour seminar on the current state of COVID-related workplace restrictions and provide practical guidance to corporate counsel in implementing policies in this rapidly changing environment.

MCLE Credit: Applying for 1 General MCLE credit

Date: Wednesday, March 9, 2022

Time: Noon – 1:00 p.m.

Where: ********ONLINE*******

Meeting link provided the day before the event

Cost: $0

Registration:

The program is free but registration is required. Click here to register. **(Note: Participants must register by noon on Tuesday, March 8, 2022.)** (Law students are welcome to attend this event.)

**Please make sure to click "Register" then click on "View Cart" at the top right of your screen, then click "Checkout"* *in order to make sure your registration is complete. If you do not receive an automated email confirmation and receipt then you did not register correctly, contact the CLE service center for assistance.*

For questions related to the meeting link, please contact Travis Benn, Travis.Benn@finastra.com.

For registration questions, please contact the OSB CLE Service Center at (503) 431-6413 or cle@osbar.org.

Exhibit B: Accreditation Form

MCLE FORM 1: Recordkeeping Form *(Do Not Return This Form to the Bar)*

Instructions:
Pursuant to MCLE Rule 7.2, every active member shall maintain records of participation in accredited CLE activities. You may wish to use this form to record your CLE activities, attaching it to a copy of the program brochure or other information regarding the CLE activity.

Do not return this form to the Oregon State Bar. This is to be retained in your own MCLE file.

Name:	Bar Number:
Sponsor of CLE Activity:	
Title of CLE Activity:	Program Number:
Date:	Location:

❑ *Activity has been accredited by the Oregon State Bar for the following credit:*	❑ **Full Credit.** *I attended the entire program and the total of authorized credits are:*	❑ **Partial Credit.** *I attended _____ hours of the program and am entitled to the following credits*:*
____ General	____ General	____ General
____ Prof. Resp.- Ethics	____ Prof. Resp.- Ethics	____ Prof. Resp.- Ethics
____ Access to Justice	____ Access to Justice	____ Access to Justice
____ Abuse Reporting	____ Abuse Reporting	____ Abuse Reporting
____ Practical Skills	____ Practical Skills	____ Practical Skills
____ Pers. Mgmt/Bus. Dev.*	____ Pers. Mgmt/Bus. Dev.*	____ Pers. Mgmt/Bus. Dev.*
____ Mental Health/Substance Use	____ Mental Health/Substance Use	____ Mental Health/Substance Use

***Credit Calculation:**
One (1) MCLE credit may be claimed for each sixty (60) minutes of actual participation. Do not include registration, introductions, business meetings and programs less than 30 minutes. MCLE credits may not be claimed for any activity that has not been accredited by the MCLE Administrator. If the program has not been accredited by the MCLE Administrator, you must submit a Group CLE Activity Accreditation application (See MCLE Form 2.)

Caveat:
If the actual program length is less than the credit hours approved, Bar members are responsible for making the appropriate adjustments in their compliance reports. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

*Personal Management Assistance/Business Development. See MCLE Rule 5.12 and Regulation 5.300 for additional information regarding Category III activities. Maximum credit that may be claimed for Category III activities is 6.0 in a three-year reporting period and 3.0 in a short reporting period.

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