

### LIVE ONSITE\* PROGRAM

2015-16 Program Proposal Illinois State Bar Association

Complete proposal forms must accompany all proposals.

\*Live onsite at any location. Live onsite in Chicago office has the option of simultaneous live webcast **Submission Deadlines -- Presentation Periods:** 

7/15	Dec./Jan
9/15	Feb./March
11/15	April/May
1/15	June
3/15	Sept.
5/15	Oct. /Nov.

Form is also available at: www.isba.org/cle/coordinators

Please Submit a Typed Form

### **EXAMPLE PROGRAM PROPOSAL**

☐ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR. Sponsoring Section Council/Standing or Special Committee: State & Local Tax Committee A. В. **Co-sponsoring ISBA Section Council(s) or Committee(s):** C. **Title of proposed program** (keep it short, simple, and catchy): 2017 Recent Revelopments in State & Local D. **Person(s) submitting proposal** (Name, address, telephone number, e-mail address, and section): David Kupiec ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com E. **Requested Program:** Live onsite program only Live onsite program in ISBA Chicago office with simultaneous live webcast (Please Note: It is imperative that speakers follow the material submission deadlines in order to ensure that live webcast attendees have access to the course materials. Handouts brought to the live, onsite program will not benefit attendees attending remotely.) F. **Requested Location and Date(s) For Live Onsite Programs:** Chicago Only; Date(s): Friday, January 27, 2016 **Chicago & Other Location within State** (indicate preferred location(s), if any, and date(s))

Other Location within State (indicate preferred location, if any, and date(s))

webcasts or live webinars for remote audiences and ISBA archives.)

(To have a live onsite audience, the program must be at least a half-day in length. Shorter programs will be live

G.

**Program Length:** 

	All day (9:00 a.m. to at least 4:00 p.m.)  Half day (at least 3.5 hours)	
Н.	Segment Length: \( \sum \) I confirm by checking this borpresentation times measurable in quarter-hour increasing remarks.	x that I have made an effort to schedule speakers for rements (15, 30, 45, 60), except introductory and
I.	Professional Responsibility MCLE credit, if inclumental illness and addiction issues, civility, and legal ethic	day programs; any presenter/topic segments within ninutes for MCLE credit purposes. Please indicate
J.	<b>Financial Contributors:</b> I have secured financial followed the guidelines of ISBA's Financial Contribute address, phone, email, and amount pledged:	contributors for this program and have reviewed and or Policy. Financial Contributor's Name(s) for publicity,
K.	Pre-Program Teleconference: $\boxtimes$ (optional) I int conference for all presenters no later than $7-8$ were assistance with telephone conference capabilities. (p	ks prior to the program date. I request ISBA
L.	<b>Publications (optional):</b> Please identify one or more <i>Journal</i> , newsletter article, or Illinois Lawyer Now blo contact this person with details about the submission p	g post related to this CLE program. ISBA staff will
	MARKETING THI For ISBA marketing purposes please indi might be interested in	cate which of the following groups
	Sections	_
=	ministrative Law	Local Government
	icultural Law	Mineral Law
	ernative Dispute Resolution	Real Estate
_	mal Law itrust	☐ Senior Lawyers ☐ State & Local Tax
	ch & Bar	Tort Law
	iness Advice & Financial Planning	Traffic Laws & Courts
	ld Law	☐ Trusts & Estates
=	il Practice	Workers' Compensation
Con	nmercial Banking, Collections & Bankruptcy	∑ Young Lawyers
	struction Law	ISBA Committees
	poration Securities & Business	ARDC
	porate Law Department minal Justice	Corrections and Sentencing
=	cation Law	☐ Disability Law ☐ Government Lawyers
=	er Law	Law Office Management & Economics
=	ployee Benefits	Legal Technology
	rgy, Utilities, Transp. & Telecomm.	Mental Health Law
☐ Env	ironmental Law	Military Affairs
	nily Law	Racial and Ethnic Minorities
	eral Civil Practice	Sexual Orientation and Gender Identity
	eral Tax	Women and the Law
=	eral Practice	Other
=	lth Care	Continual Dublic A
	nan Rights Irance Law	Certified Public Accountants* (*ISBA is approved
_	llectual Property	as a registered public accountant continuing professional education (CPE) sponsor.)
	rnational & Immigration Law	Other Organizations/Agencies
	or & Employment	

#### ISBA Law Ed LIVE ONSITE\* Program Agenda Template

\*Live onsite at any location or live onsite in Chicago office with simultaneous live webcast. (Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

**Program Title:** 2017 Recent Revelopments in State & Local Tax

**Sponsoring Section:** State & Local Tax

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To what specific type of practitioner is this program directed?
(Identify the targeted substantive law practice areas)
State & Local Tax Attorneys or other Attorneys with an interest in state tax practicing at law firms, industry or
govenrmental agencies
To what level of practice experience is this program directed?
☐ Basic ☐ Intermediate ☐ Advanced
Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince
him/her to register for it? What will attendees take away?
The purpose of this program is to update the participants as to recent changes in statutory, regulatory, case law and police
concerning Illinois State and local taxes
<u>Lead Coordinator Name, Address, Telephone Number, E-mail Address: (Complimentary program registration is provided for one coordinator.)</u>
David J. Kupiec, JD, CPA
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890
Sample@email.com
On-Site Program Moderator ( <u>Please Note</u> : In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs. Any additional moderators or coordinators can attend the program for \$25. Please indicate the moderator receiving travel/hotel reimbursement: and moderator(s) receiving complimentary registration* David Kupiec
Moderator Name Addresses Telephone Number E meil Address

#### Moderator Name, Addresses, Telephone Number, E-mail Address

David J. Kupiec

See Above

#### **Speaker Recruitment**

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

- Speaker will agree to submit materials and Power Point 4 weeks prior to program date for MCLE topics and 6 weeks prior to program date for PMCLE topics
- Speaker will agree to submit original materials or to secure written permission for ISBA to reprint copyrighted works in course books and electronic products
- Speaker agrees to arrive not less than 30 minutes prior to presenting
- Speaker is an ISBA Member or I will invite the presenter to join ISBA (http://www.isba.org/membership/join)

- Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement
- Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf
- Speaker has completed all or part of ISBA's faculty development series <a href="www.isba.org/cle/faculty">www.isba.org/cle/faculty</a>
- If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters

#### Directions for Preparing the Program Agenda and Submitting Program Proposal

# When drafting the Program Agenda, include the following information for each segment topic

	Please attach additional pages for each segment as needed.
√ √ √	Topic Title State Tax Legislative Issues That Businesses Are Concerned About  Topic Length (in 15-minute increments only)45 minutes  Topic Description (2-3 sentences) Representatives from the Illinois Chamber of Commerce and the Taxpayers' Of Illinois address state tax legislative issues that impact their members. This session will also include a discussion of proposed and potential Legislative items that the business community supports as well as items that impact all Illinois residents.
✓	Presenter Name, Address, Telephone Number (cell and office), & E-mail Address
	Carol S. Portman ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com  Keith Staats ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com
✓ ✓	(optional) One web address to link from the ISBA program webpage to the speaker's biographical information or firm website  If using out-of-state presenters, please include justification:
✓ ✓ ✓ ✓	Topic Description (2-3 sentences) This session provides an Illinois Department of Revenue update on current tax and administrative issues as well as recent Department policy changes.  Presenter Name, Address, Telephone Number (cell and office), & E-mail Address
	Mark Dyckman ABC Law Firm

123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com Brian E. Fliflet ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com ✓ (optional) One web address to link from the ISBA program webpage to the speaker's biographical information or firm website ✓ If using out-of-state presenters, please include justification: \_\_\_\_\_ Topic Title Cook County and City of Chicago Tax Changes and Court Case Update ✓ **Topic Length** (in 15-minute increments only) 45 minutes ✓ Topic Description (2-3 sentences) An overview of recent Cook County and City of Chicago tax changes including changes to Chicago's lease tax, amusement tax as well as a discussion concerning recently issued and pending court cases. ✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address Stanley R. Kaminski ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com David J. Kupiec ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com

✓	(optional) One web address to link from the 18511 program webpage to the speaker's biographical
	information or firm website
✓	If using out-of-state presenters, please include justification:
✓	Topic Title Recent Illinois Property Tax Legislative Changes, Court Decisions and Issues To Monitor
✓	<b>Topic Length</b> (in 15-minute increments only)_60 minutes
✓	<b>Topic Description</b> (2-3 sentences) This panel presentation addresses the property tax issues that are
	currently being considered by the Illinois General Assembly, as well as potential policy issues and recent court
	decisions.

✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address \_\_\_\_\_

Timothy E. Moran ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com

John K. Norris ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com Gary H. Smith ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com ✓ (optional) One web address to link from the ISBA program webpage to the speaker's biographical information or firm website ✓ If using out-of-state presenters, please include justification: \_\_\_\_\_ ✓ **Topic Title** Recent Illinois Income, Franchise & Sales Tax Legislation, Court Decisions, Regulations and Issues to Monitor **Topic Length** (in 15-minute increments only) 45 ✓ **Topic Description** (2-3 sentences) This session provides an overview of recent Illinois income, franchise and sales tax issues being addressed by the Illinois Courts as well as the recently enacted sales and income tax legislation. ✓ Presenter Name, Address, Telephone Number (cell and office), & E-mail Address David P. Dorner ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com Natalie M. Martin ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com

✓ (optional) One web address to link from the ISBA program webpage to the speaker's biographical

information or firm website

✓ If using out-of-state presenters, please include justification:

# Please attach your Program Agenda to this completed Form. Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:

CLE Department, Attn: Janean Goby Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701 Fax: (217) 525-0712 e-mail: jgoby@isba.org

Thank you for your proposal!

#### **COORDINATORS:**

Please distribute the following page to each of your speakers so they will know what to expect from ISBA and what ISBA needs from them. This form can also be found online at:

www.isba.org/cle/coordinators



#### THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

#### What you can expect:

□ Contact from the ISBA CLE Coordinator to confirm the dates and times for your presentation
 □ Contact from the ISBA CLE Department regarding deadlines and program information
 □ Publicity for you and your firm in ISBA brochures, marketing emails, and/or color flyers, as well as on our website and in the course materials
 □ A speaker invitation letter that you can use to invite all your peers to the program
 □ Complimentary preparation time MCLE credit at 6 times your actual presentation time
 □ Complimentary registration to the program at which you are speaking

## What ISBA Expects:

Your agreement to submit written materials, legal forms, and/or PowerPoint presentation
at least 4 weeks prior to program date for MCLE topics and 6 weeks prior to program date
for PMCLE topics
Your agreement to submit original materials or to secure written permission for
ISBA to reprint copyrighted works in course books and electronic products
Your agreement to arrive not less than 30 minutes prior to presenting
Your membership in ISBA – or consideration to join ISBA
(http://www.isba.org/membership/join)
Your agreement to be videotaped by submitting a signed ISBA presentation
agreement
Your agreement to review the Checklist for Professional Responsibility topic presentations
if you are presenting a segment that qualifies for PMCLE credit
(www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Profession
alism%20Checklist.pdf)
Your review and completion of all or part of ISBA's Faculty Development Series
(www.isba.org/cle/faculty)
Your agreement to comply with the ISBA travel reimbursement guidelines and
limitations



# STUDIO or WEBINAR PRESENTATIONS\*

2015-16 Program Proposal Illinois State Bar Association

#### Complete forms must accompany all proposals.

#### \*NO ONSITE AUDIENCE.

- Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois.
- Webinars are slides and audio presented lived from any location that has Internet and phone.

**Submission Deadlines\* -- Recording Periods:** 

7/15	Oct./Nov.
9/15	Dec./Jan.
11/15	Feb./March
1/15	April/May
3/15	June
5/15	Sept.

\*For "hot topics" you may request an expedited schedule for your recording date.

Form is also available at: www.isba.org/cle/coordinators

Please Submit a Typed Form

## **EXAMPLE PROGRAM PROPOSAL**

☑ I CONFIRM BY CHECKING THIS BOX THAT I HAVE MADE AN EFFORT TO SECURE PRESENTERS WHO REFLECT THE GEOGRAPHIC, ETHNIC, AND GENDER DIVERSITY OF THE BAR.

- A. Sponsoring Section Council/Standing or Special Committee: Administrative Law Section Council
- **B.** Co-sponsoring ISBA Section Council(s) or Committee(s): International and Immigration Law Section Council
- C. Title of proposed program (keep it short, simple, and catchy!): Immigration Hearings: How to Get the Job Done
- **D. Person(s) submitting proposal** (Include name, address, telephone number, e-mail address, and section committee on which you serve):

Tracy Douglas
ABC Law Firm
123 Street Name Rd.
City, IL 12345
123-456-7890

#### Sample@email.com

- E. Requested Program Date(s)\*: March 23
  \*If Hot Topic Expedited Date is Requested, Provide Justification \_\_\_\_\_
- **F. Short Program Length, indicate time:** (1-2 hours recommended) 1 hour

G.		we made an effort to schedule speakers for presentation ats (15, 30, 45, 60), except introductory and closing		
н.	mental illness and addiction issues, civility, and leg programs and a minimum of one-half hour	f included: PMCLE topics (professionalism, diversity issues, gal ethics) must be a minimum of one hour for full day for half day programs; any presenter/topic segments crements of 15 minutes for MCLE credit purposes. ICLE credit hours: 1		
I.	conference for all presenters no later than 7	: I intend to lead a pre-program planning telephone 7 – 8 weeks prior to the program date. I request ISBA ilities. (preferred telephone conference date or		
J.	☐ <b>Publications (optional):</b> Please identify one or more authors to write on program topics for an <i>Illinoi Bar Journal</i> , newsletter article, or Illinois Lawyer Now blog post related to this CLE program. ISBA staff will contact this person with details about the submission process			
	MARKETING	G THE PROGRAM		
		please indicate which of the following		
		terested in this program:		
ISBA	A Sections	• 0		
$\boxtimes$ A	dministrative Law	Local Government		
$\square$ A	gricultural Law	☐ Mineral Law		
$\square$ A	Iternative Dispute Resolution	Real Estate		
□ A₁	nimal Law	Senior Lawyers		
=	ntitrust	State & Local Tax		
=	ench & Bar	Tort Law		
	usiness Advice & Financial Planning	Traffic Laws & Courts		
=	hild Law	Trusts & Estates		
=	vil Practice	Workers' Compensation		
	ommercial Banking, Collections & Bankruptcy	Young Lawyers		
=	onstruction Law	ISBA Committees		
	orporation Securities & Business orporate Law Department	☐ ARDC		
	riminal Justice	☐ Corrections and Sentencing ☐ Disability Law		
	lucation Law	☐ Disability Law  ☐ Government Lawyers		
=	der Law	Law Office Management & Economics		
_	mployee Benefits	Legal Technology		
	nergy, Utilities, Transp. & Telecomm.	Mental Health Law		
	nvironmental Law	Military Affairs		
⊠ Fa	amily Law	Racial and Ethnic Minorities		
	ederal Civil Practice	Sexual Orientation and Gender Identity		
☐ Fe	ederal Tax	Women and the Law		
=	eneral Practice	Other		
=	ealth Care			
	uman Rights	☐ Certified Public Accountants* (*ISBA is approved		
	surance Law	as a registered public accountant continuing		
	tellectual Property	professional education (CPE) sponsor.)		
	ternational & Immigration Law	Other Organizations/Agencies		
$\square$ La	abor & Employment			

#### ISBA Law Ed STUDIO or WEBINAR PRESENTATION Program Agenda Template

\*No onsite audience. Studio Presentations are live webcasts aired via the Internet at the time of recording from the ISBA Regional Office, Chicago, Illinois. Webinars are slides and audio presented live from any location that has Internet and phone capabilities.

(Reminder: The text you submit is the basis for ISBA marketing efforts. Please submit the exact language you recommend for our ads, brochures, etc. ISBA editorial staff will work from this submission, editing as needed.)

Program Title: Immigration Hearings: How to Get the Job Done
Sponsoring Section: Administrative Law Section Council
To what specific type of practitioner is this program directed?  (Identify the targeted substantive law practice areas)
To what level of practice experience is this program directed?
Learning Objectives: What is the specific need this program addresses? What would you tell someone to convince him/her to register for it? What will attendees take away?  A person comes to you with notice of an immigration hearing. How would you handle the case? Attendees will learn the nuts and bolts of how immigration hearings work and how to best represent their clients.
Lead Coordinator Name, Address, Telephone Number, E-mail Address: (complimentary program registration is provided for one coordinator.)  Tracy Douglas ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com
<b>Program Moderator</b> ( <u>Please Note</u> : In our efforts to keep expenses to a minimum, local moderators are preferred and only one moderator will receive travel/hotel reimbursement per program. Complimentary program registration is provided for one moderator for half-day programs and two moderators for full-day programs. <b>Any additional moderators or coordinators can attend the program for \$25.</b> Please indicate the moderator receiving travel/hotel reimbursement: and moderator(s) receiving complimentary registration*
Interviewer/Moderator Name, Addresses, Telephone Number, E-mail Address Patrick Kinnally ABC Law Firm 123 Street Name Rd. City, IL 12345 123-456-7890 Sample@email.com

#### **Speaker Recruitment**

When selecting speakers please consider the following requirements and communicate these requirements to each speaker when invited:

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- Speaker agrees to arrive not less than 30 minutes prior to presenting
- Speaker is an ISBA Member or I will invite the presenter to join ISBA (http://www.isba.org/membership/join)
- Speaker agrees to be videotaped and has or will sign and submit an ISBA presentation agreement

- Speaker has received the checklist for PMCLE topic presentations www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Professionalism%20Checklist.pdf
- Speaker has completed all or part of ISBA's faculty development series www.isba.org/cle/faculty
- If speaker is an out-of-state presenter, he/she agrees to same reimbursement limits as ISBA's in-state presenters

#### Directions for Preparing the Program Agenda and Submitting Program Proposal

# When drafting the Program Agenda, include the following information for each segment topic:

Please attach additional pages for each segment as needed.

✓	Topic Title: Immigration Hearings: How to Get the Job Done
✓	<b>Topic Length</b> (in 15-minute increments only) 1 hour
✓	Topic Description (2-3 sentences) How do immigration review hearings go? A panel of immigration attorney
	will explain how hearings proceed and how to best represent your client in an immigration hearing.
✓	Presenter/Panelist Name, Address, Telephone Number, & E-mail Address
✓	(optional) One web address to link from the ISBA program webpage to the speaker's biographical
	information or firm website
✓	If out-of-state presenter, please include justification:
	Patrick Kinnally
	ABC Law Firm
	123 Street Name Rd.
	City, IL 12345
	123-456-7890
	Sample@email.com
	Scott Pollock
	ABC Law Firm
	123 Street Name Rd.
	City, IL 12345
	123-456-7890
	Sample@email.com
<b>√</b>	(optional) One web address to link from the ISBA program webpage to the speaker's biographical
	information or firm website
	Please attach your Program Agenda to this completed Form.
	Submit your proposal, with completed Agenda and any attachments in Microsoft Word to:
	CLE Department, Attn: Janean Goby
	Illinois State Bar Association, 424 South Second Street, Springfield, IL 62701
	Fax: (217) 525-0712 e-mail: jobgy@isba.org
	Thank you for your proposal!

#### **COORDINATORS:**

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www.isba.org/cle/coordinators



#### THANK YOU FOR AGREEING TO SPEAK FOR THE ISBA!

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well as on our website and in the course materials
A speaker invitation letter that you can use to invite all your peers to the program
Complimentary preparation time MCLE credit at 6 times your actual presentation time
Complimentary registration to the program at which you are speaking

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   □ Your agreement to arrive not less than 30 minutes prior to presenting
- ☐ Your membership in ISBA or consideration to join ISBA

(http://www.isba.org/membership/join)
Your agreement to be videotaped by submitting a signed ISBA presentation
agreement
Your agreement to review the Checklist for Professional Responsibility topic presentations
if you are presenting a segment that qualifies for PMCLE credit
(www.isba.org/sites/default/files/cle/coordinators/IL%20Commission%20on%20Profession
alism%20Checklist.pdf)
Your review and completion of all or part of ISBA's Faculty Development Series
(www.isba.org/cle/faculty)
Your agreement to comply with the ISBA travel reimbursement guidelines and
limitations