

HOW-TO'S AND NUTS AND BOLTS OF PLANNING YOUR DISTRICT COURT CONFERENCE
Topic List and Survey

LAWYER REPRESENTATIVES' BUSINESS MEETING

1:00 P.M. – 2:30 P.M.

Monday, July 13, 2015

Point Loma/Solana Rooms, First Floor, South Tower
Marriott Marquis San Diego Marina

Dear Lawyer Representative,

You probably received a copy of the following topic list and survey by email prior to the conference, but here is another copy for your review and reference in case you did not receive the email or did not have a chance to fill this sheet out and return it prior to the conference. Please bring it with you to the Lawyer Representatives' Business Meeting.

INSTRUCTIONS:

Please take a few minutes to fill out this handout and bring it along to the Lawyer Representatives' Business Meeting on Monday afternoon at 1:00 p.m. to aid our group discussion on planning district court conferences, which will be led by Mia Giacomazzi (CAE) and Susan Pitchford (OR). We will collect these sheets at the end of the discussion to learn more about the variety of topics and issues of interest to Lawyer Representatives throughout the Ninth Circuit with respect to district court conference planning. Please fill in your name and district at the end of the handout to help educate the LRCC about specific planning practices in individual districts, large and small.

GENESIS AND PURPOSE OF TOPIC LIST AND SURVEY:

As you probably know, part of a Lawyer Representative's role in most districts is participation to some degree in planning the district's annual district court conference. During a recent LRCC conference call, Mia Giacomazzi observed wisely that most lawyers are not really trained event planners, yet Lawyer Representatives are called upon to help plan one or more district court conferences. It can be daunting, especially the first time.

Building on Mia's observation, Susan Pitchford promptly drew up the following detailed (but certainly nonexhaustive) list of considerations that might come up when planning a district court conference, depending on the particular district. Please help us to learn about the planning experience and process in your own district, to facilitate an interactive discussion and exchange of information among districts at the Business Meeting.

Thank you for your input, and we look forward to seeing you at the meeting on Monday afternoon.

Margaret Foley, NV, LRCC Chair-Elect
Mia Giacomazzi, CAE LRCC Co-Chair
Susan Pitchford, OR LRCC Chair

**HOW-TO'S AND NUTS AND BOLTS OF PLANNING YOUR DISTRICT COURT CONFERENCE
Topic List and Survey**

Please check the appropriate boxes below for (a) topics that seem pertinent to your particular district; and/or (b) topics you would like to be included in the discussion at the Lawyer Representatives Business Meeting.

Additional space is provided for questions or comments, as well as space at the end of the list to add any other topics you may wish to include.

Please remember to fill in your name and district at the end to help us identify similarities and differences among individual districts.

	<u>Pertinent?</u>	<u>Include?</u>
1. What legal entity is hosting the conference?	_____	_____
a. The court?	_____	_____
b. FBA?	_____	_____
c. Are Lawyer Reps a legal entity?	_____	_____
d. Is it its own entity?	_____	_____
e. Is it a non-profit tax entity?	_____	_____

2. Who is part of the planning team?	_____	_____
a. Lawyer reps?	_____	_____
b. Judges?	_____	_____
c. FBA?	_____	_____
d. Other volunteers?	_____	_____
e. Court staff?	_____	_____

3. What is your liability as a conference planner?

a. Part of a legal entity?

b. For costs / deposits?

_____	_____
_____	_____
_____	_____

4. Who is invited to the conference?

a. Open to all lawyers?

b. The general public?

c. Law students?

d. State court judges?

e. FBA members?

f. Court staff?

g. Who decides?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

5. How do you manage invitations and RSVPs?

a. ECF mail blast?

b. Paper invites?

c. Constant contact or similar?

d. How do you collect money and record preferences for food, etc.?

_____	_____
_____	_____
_____	_____
_____	_____

6. How are the funds for the conference administered?

- a. Own bank account?
- b. FBA bank account?
- c. Court bank account?

_____	_____
_____	_____
_____	_____
_____	_____

7. Where does the funding for the conference come from?

- a. Is there Ninth Circuit seed money (no)?
- b. Does the court have a budget for this?
- c. Attorney admission fund?
- d. Law firm sponsorships?
- e. Attendee funded?
- f. Who can do fundraising for the conference, if applicable?
 - i. Where to send sponsorship money?
 - ii. Is this a tax-deductible contribution?
 - iii. Are you offering sufficient incentives for firms to characterize as a “marketing” expense?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

8. How do you set the attendance rate?

- a. Goal is to break even or make a profit?
- b. Whose attendance is complimentary?
 - i. Judges?
 - ii. Law clerks?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

- iii. Students? _____
- iv. No one? _____

- 9. Where is the event held?** _____
- a. At the court house? _____
 - b. At a hotel meeting space? _____
 - c. At a law firm? _____
 - d. At a private facility? _____

- 10. Does the Court have adequate IT for the facility?** _____

- 11. Have the marshals been notified and done a security sweep?** _____

- 12. Who are the speakers?** _____
- a. Who decides? _____
 - b. Who vets written materials? _____
 - c. Do we need handouts for CLE credit? _____
 - d. Who applies for CLE credit? _____

13. Is there money to cover planning costs?

- a. CLE credit application?
- b. Website development?
- c. Publicity?
- d. Deposits on the facility space, catering, etc.?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

14. Publicity?

- a. What can be posted on the Court website?
 - i. Who does that?
 - ii. Does identifying law firm sponsors = court endorsement?
- b. Does the conference have its own website?
- c. FBA website?
- d. Media contacts?
- e. Who has to approve messages about conference?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

15. Do you have insurance for the conference?

_____	_____
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16. How will we handle planning logistics?

- a. Regular planning meetings?
- b. Drop box or similar on documents?

_____	_____
_____	_____
_____	_____

17. What topics would the court like to address in the conference this year?

18. What went particularly well for the last conference?

19. What should be improved from the last conference?

20. What else should be included on this list?

Name: _____

District: _____