NYU | LAW

# CLE Checklist for Events

## Plan Your Request

- ☐ Consider timing, format, budget, and other factors.

## Submit Your Request

Create a document with the following information. Email your document to law.cle@nyu.edu.

- ☐ Event Details
  - Title
  - Sponsor department or center
  - Contact person
  - Date
  - Time
  - Location (City/State, webinar, etc.)
  - Category of Credit
  - Level of Difficulty
  - Format
  - Fee
- ☐ Timed Agenda
  - Indicate start and end times for each session (panel, keynote, round table, etc.).
  - Indicate introductions, breaks, conclusions, question-and-answer time, etc.
  - For each session, list the topics to be presented and describe the content and legal learning objectives.
- ☐ Written Materials
  - For each session, provide a bibliography of written materials to accompany the topics to be presented.
  - Provide a link or pdf for each document you plan to distribute as your written materials.
  - Obtain copyright clearance for each document you plan to distribute as your written materials.
- ☐ Faculty Biographies
  - Provide a bibliography for each moderator, speaker, and panelist. Bibliographies should nclude all degrees earned and the institutions at which they were earned.
  - For each session, you must include at least one lawyer or ABA-accredited law school professor.
  - No disbarred attorneys may serve as CLE faculty.
- ☐ Promotional Materials
  - Attach copies of all promotional materials created for your event.
  - Do not promote CLE credit until after your event is approved.
  - Materials promoting CLE credit must include language on level of difficulty and category of credit.
  - If a fee is charged, the NYU Law CLE Financial Aid Policy must be included in your promotional materials.
- ☐ Attendance Verification Materials
  - Describe your planned attendance verification procedures.
  - Include copies of any forms you plan to use.

## Approval

## Before Your Approved Event

- ☐ Promote your event using the appropriate text.
- ☐ Preregister attendees, if possible.
- ☐ Consider financial aid requests, if applicable.
- ☐ Distribute written materials and/or print hard copies of your written materials (required for traditional live classroom events).
- ☐ Prepare attendance verification materials, if you have not already done so:
  - Sign-in/out sheet for traditional live classroom events
  - Attorney affirmations for non-traditional formats (webinar)
  - CLE course codes for non-traditional formats (webinar).
- ☐ Prepare an evaluation form to distribute to attendees (all event formats).

## During Your Approved Event

- ☐ Distribute written materials.
- ☐ Verify attendance:
  - Traditional Live Classroom: Remind attendees to sign-in and sign-out, noting the time of arrival and departure
  - Webinar: Instruct attendees to record CLE course code(s) and complete a CLE attorney affirmation.
  - Webinar: Announce CLE course code(s).
- ☐ Distribute and collect event evaluation forms.

## After Your Approved Event

- ☐ Scan and forward the following to the CLE coordinator:
  - Completed and returned course evaluation forms
  - Sign-in/out sheet with at least two signatures per attendee and times of arrival and departure (for traditional live classroom events)
  - All returned CLE attorney affirmations (for non-traditional events).
- ☐ Email the CLE coordinator Excel documents with the following fields:
  - Attendee first and last name, email address, sign-in time, and sign-out time (for traditional live classroom events)
  - Attendee first and last name, email address, and a field for each CLE course code with an indication of whether or not the attendee returned the correct course code (non-traditional events).
- ☐ Email the following to the CLE coordinator:
  - A Zoom usage report (for live simultaneous transmission events using Zoom).
  - A final timed agenda noting any changes to times, event faculty, written materials, biographies, etc.
  - A list of event faculty who have requested CLE credit.