

FORMATTING INSTRUCTIONS

PLEASE READ!

Before you begin preparing your article for this course we want to point out a change in the formatting of the materials. To reduce the time it takes to prepare your paper, we are minimizing our formatting instructions. **Papers should be submitted in single-column format with all text in black or automatic font.** Please do not paginate or add headers and footers. Our Written Materials Coordinators will format your paper into the traditional double-column format and add the headers and footers in for you when they receive your article. **Biographies should be included on a separate page before the Table of Contents or as a separate document.** Feel free to review the attached guidelines for more details.

As always, we do not wish you to spend a lot of time perfecting the formatting. It is more important that we receive your article by the deadline.

Thank you.



Author Instructions

TexasBarCLE

Preparing and submitting your CLE article to the State Bar

Scope of Your Article

A course article is a full-sentence legal commentary, not an outline or a transcript of a talk. Your work will be a reference tool and should therefore be as comprehensive, detailed, and accurate as you can make it.

Strive to cover your subject thoroughly. Most articles are 10-30 pages, single-columned and single-spaced, and go into more detail than can be related in the time allotted for the speech.

New Work or Revisions

Changes in the law, shifting judgments among experts about what is important, and our continuing effort to bring Texas lawyers the best available commentary, prompt us to ask you to draft a new article rather than supplement or revise previous work.

Of course, all legal writing is derivative, and we encourage you to make liberal use of published State Bar materials. Please first obtain permission from the prior authors and include acknowledgements to them.

Some topics are the same from year to year, and in such cases, authors are permitted to update last year's work. However, the revision should be integrated into the prior work and put in our format, keeping in mind the recommended 30-page limit. It should not be a supplement to last year's article.

Write to educate, not to impress. Use simple language and short sentences. Avoid the passive voice. Explain terms nonspecialists are unlikely to know. Your article will be used more often if it is easy to read.

Emphasize the Practical

Forms, checklists, and sample documents are in demand and can be superb educational tools. Include them as appendices if relevant.

Format

Use of our format enables us to deliver a useful, better-looking product and saves thousands of dollars in printing costs annually.

We appreciate the hard work of you and your staff to format the article. Still, we do not wish you to spend a lot of time perfecting formatting. It is more important that we receive your article by the deadline. E-mailing the article to us allows you the maximum latitude to meet the deadline.

Title

Give your article a title that is short (a maximum of 12 words or 70 characters) and describes the substance of your topic. The short title will appear at the top of every page. Others will use the topic search to locate your article for their research, so please keep that in mind when titling your work.

Article Structure

Headings in the text and table of contents should be numbered and spaced in outline form — that is, I,A,1,a,(1). Try to organize your article in this hierarchical format in a way that clarifies and simplifies your topic. Build your analysis into the structure of your article and avoid going beyond the fifth level of the outline form. If you must go beyond this level, please use bullets.

Descriptive Headings

Use descriptive headings throughout your article. A detailed table of contents based on these headings will be generated if the typist uses the word processing program's automatic Table of Contents tool. Use of this feature will enable us to generate an accurate table of contents even if reformatting is necessary. It will also eliminate the need for a subject index and magnify the reference value of your work.

Copyright ©

The language below addresses use by the State Bar of your recorded presentation and written materials. TexasBarCLE archives nearly all of its CLE events both for video replays in additional locations and for streaming via its Website. Course materials are archived for access via the site. Additional uses of these archived formats may be made in the future to better serve Texas lawyers.

Your Written Material

You retain the individual copyright to your written material, allowing you to freely sell or otherwise distribute it and revise or republish it at will. The State Bar owns a copyright to the collected work in which your material will appear. Submission of your material grants the State Bar a nonexclusive license for the Bar's benefit to reproduce, sell, and otherwise distribute all or portions of your material under your name, individually or as part of collective and derivative works, through any media now known or that might be created.

Your Live Presentation

You retain the individual copyright in your live presentation, allowing you to freely present and revise subsequent presentations at will. The State Bar owns the copyright to its electronic capture of your live presentation.

Giving your presentation grants the State Bar a nonexclusive license for the Bar's benefit to reproduce, sell, and otherwise distribute all or portions of your presentation (including any audio/visual aids incorporated therein) under your name, individually or as part of collective and derivative works, through any media now known or that might be created.

Material Copyrighted by Third Parties

Your use of copyrighted material is a representation by you to the State Bar that you have obtained the rights necessary to such material for the benefit of the State Bar with respect to the nonexclusive licenses described above.

Ethics and Malpractice

Alert the reader to relevant ethical issues and malpractice risks. When suggesting tactics, keep in mind the high ethical standards of the profession. Warn of any questionable tactics.

Abstract

Under the heading Introduction, include a short abstract (50 words or less) describing your article. The abstract will be used to market the article.

Citations

Use standard law review rules. Include enough citations to enable the reader to readily verify your substantive statements, but avoid string citations. Cite directly in the text, not in end-notes. At least once per page give the full citation to any case you mention.

A Table of Authorities is appreciated but not required. If you do generate one, please use your word processor's automatic Table of Authorities feature. Use of it will enable us to generate an accurate Table of Authorities even if reformatting is necessary.

Appendices

Please do not include forms, tables, charts, graphs, statutes or hard-to-find regulations in your text. Include them as appendices.

Furthermore, avoid submitting cartoons, copies of form books, or screen captures of Web pages with your article.

Easily located cases should be cited and/or briefed within the body of your article; do not include the full text of a case in your article or an appendix.

Do not send hard copies of appendices as a substitute for e-mailing an electronic version.

Bibliography

Include a bibliography if you are writing in an area of law where source materials are hard to find or if you wish to include citations to articles or other materials.

Reformatting

To get your work into print quickly, we ask that you follow our formatting guidelines as closely as your word processing capabilities allow. However, if the article is not submitted in our format, and if time permits, we will reformat it and e-mail it to you for your information. This version will be in PDF (Portable Document Format), which can be read by the Adobe® Acrobat® Reader™. Download the free Reader at www.adobe.com/products/acrobat/readstep.html. If we reformat your article, we will do our best to provide you with the published version prior to the program so that you may refer to the correct page numbers in your speech.

Timely Submission

Your article, along with all others submitted for the course, will be made available to preregistrants via our website prior to the event. This way, registrants may study your article beforehand or download it to a laptop or mobile device to bring with them to the course.

Please help us deliver on this newly-added course benefit. If your article is not submitted to us by the deadline, it will likely not be uploaded to our website in advance of the course.



Avoiding the Appearance of Endorsement of Candidates or Parties

- ▶ No endorsement of political parties or candidates is permitted in a TexasBarCLE presentation or course materials.
- ▶ No speaker may wear or display any promotional political materials while speaking.
- ▶ No reference may be made to one's campaign or opponent.
- ▶ Introductions shall not reference that the speaker is a candidate for public office.
- ▶ Your participation in a course after you receive this written notice reflects your agreement to follow this policy.
- ▶ Robust discussion of controversial issues regarding the law, legal process, law practice and law practice management is considered a valuable educational tool at TexasBarCLE events.



**If your topic (or a portion of your topic)
has been accredited for ethics, please note that:**

- **Ethics hours are rounded to the nearest one-quarter hour for purposes of oral presentations!** For example, if your topic has been accredited for .25 ethics hours, that does not mean you have to present 15 full minutes of ethics. Instead, it means that you can present between 7 minutes and 30 seconds and 22 minutes and 29 seconds of ethics. Similarly, a topic with .5 hours of ethics means it has between 22 minutes 30 and 37 minutes and 29 seconds of ethics, etc.).
- **The term “ethics” encompasses two areas: “Legal Ethics” and/or “Legal Professional Responsibility,” the definitions of which are:**
 - **Legal Ethics** topics cover the “usages and customs among members of the legal profession; involving their moral and professional duties toward one another, toward clients, and toward the courts.”
 - **Legal Professional Responsibility** topics cover “maintaining the integrity and competence of the Bar so that legal services are delivered with the highest degree of professional conduct... [including] training in skills and concepts that promote and/or assist lawyers in the delivery of high quality legal services to clients such as managing risk and grievance/malpractice avoidance, effective and ethical client and case management, and trust account management.”
 - **Legal Ethics and Legal Professional Responsibility** topics cover the “disciplinary rules of professional conduct, rules of disciplinary procedure, and... the use and availability of alternative dispute resolution and pro-bono legal services” but DO NOT include “topics that deal with government or business ethics, individual religious or moral responsibilities, training in personal or organizational skills, general office skills, time management, leadership skills or stress management.”

**If you have any questions about the above,
please contact the course Program Planner at 800-204-2222, ext 1574.**

Guide lines for Article Formatting

Please note that we are simplifying our formatting instructions for authors. While we still need to publish articles as we have in the past, we will no longer ask you to submit your article in two column format and have done away with many of the more problematic aspects of formatting your paper. Some basic requests are listed below. Before starting your paper change your page and paragraph formatting to the following parameters:

⇒	<u>Margins</u>	Top .25" Bottom .25" Left .65" Right .65" Header .25" Footer .25"
⇒	<u>Cover Page:</u> Article Title Name, <i>City</i> Firm/ Company	Centered Font: Times New Roman Bold, 16.5 pt.
⇒	<u>Short Biography</u>	Submit a one page Biography for introduction purposes.
⇒	<u>Table of Contents</u>	IF YOU ARE COMFORTABLE USING YOUR WORD PROCESSING PROGRAM , use the program's Table of Contents tool for creating and generating this feature. 11 pt.
⇒	<u>Table of Authorities</u> (not required)	Use your word processing program's Table of Authorities tool for creating and generating this feature. Do not attempt to format it. TBC LE will not create your Table of Authorities , and if you create one that is not linked to your text, TBC LE will not format the article . 11 pt.
⇒	<u>Body of Article</u>	Font: Times New Roman, Font Color: Automatic Black, 11 pt.
⇒	<u>Attachments or Appendices</u>	If you have attachments, send them as separate files. These are not formatted.

QUICK FORMATTING REFERENCE GUIDE

All outline levels, [I, A, 1., a., (1)] begin at the left margin.

Lists are tabbed one indentation.

Lengthy quotes are usually indented on the left and the right

A lengthy citation, long quote, is not tabbed and has a space before and after. Short cites and quotes can remain in the body of a paragraph.

Appendices should be included in your automatic page numbering and table of contents. Appendices are generally NOT put in columns.

All elements of an article including cover page, vitae, table of contents, table of authorities, appendices and the main body of text should be sent as one electronic file.

All outline levels are at the left margin and NOT tabbed.

BIOS /CVs should be one page – and NEVER longer than your article! 😊

Send your article via email to your program coordinator and written material coordinator.

DO NOT LET FORMATTING MAKE YOU MISS YOUR DEADLINE! Our goal is to present a level of continuity but, it is most important that the article is in our office by the deadline. If you are struggling, get your paper in early and let us help you with any problems you encounter. Articles received after the deadline may not be formatted.

If you have any questions about formatting, please call 800.204.2222

TITLE OF ARTICLE

NAME OF SPEAKER, *City*
Firm or Organization name

State Bar of Texas
#th ANNUAL
COURSE NAME
Month Date, Year
City

CHAPTER #

-----NEXT PAGE-----

TABLE OF CONTENTS

I. INTRODUCTION1

II. COENVOLENV2

A. Bcoj Indfl5

B. Xowejnkl9

1. Beonc Pjvk Onkvn10

2. Vvowen Te12

a. Qpvk Pcpcll
.....13

b. Ieovjwopp17

(1) Doc Hpnw21

(2) Pocwl Xi Gpxo23

III. CONBAH WOCLPP24

APPENDIX A27

APPENDIX B30

i

(SAMPLE VITA - Limit to 1 page)

JOHN DOE
Doe & Associates
123 Main Street
Austin, Texas 78701
512-555-5555
FAX: 512-555-5551

BIOGRAPHICAL INFORMATION

EDUCATION
B.S. in Physics with High Honors, The University of Michigan
J.D. with Honors, The University of Texas
M.B.A., Harvard Business School

PROFESSIONAL ACTIVITIES
Partner, Smart & Associates, Austin, TX - Head of Litigation Section
Board Certified in Personal Injury and Civil Trial
Life Fellow of Board of Trustees of the Texas Bar Foundation
Past Member of The Board of Directors, State Bar of Texas
Outstanding Young Lawyer in Texas - 1985
Past Chairperson, Litigation Section, American Bar Association
Member; American Board of Trial Advocates;

PUBLICATIONS, ACADEMIC APPOINTMENTS & HONORS
Author/Speaker for the State Bar of Texas PDP 1977 to present
Co-Author of State Bar of Texas publication *Keeping on Top of Your Practice*, 1982
Faculty Member, Texas College of Trial Advocacy
Adjunct Professor of Law, University of Texas School of Law

APPENDIX A

IN RE: WOIVN OF WOV §
EOVNE ESTATE OF Cause No. _____

ORDER WOVNSRU WRYBERIVNTR

ON THIS DAY ewoiv oas utoily jkljiu toivlnoie tu oiioi utoaetua eo sbjoih. Pyopa eo itpe[ptiorij bnistrtu peuto e tjib hnostua e iroj ps uti ko ypi yipsj ypasys i goi pm os itypvp euhtoi ehtop sj bish tyinvi a ete oituowejtoi.

IT IS THEREFORE ORDERED, ADJUDGED and DECREED eroiu ovnaietu oqi utopa ejtoeajo vjiouter otu _____, ovmoet uoflo utaatu oajv.

JUDGE PRESIDING

APPROVED:

By: _____
Peovmlau Weonljghl

TITLE OF ARTICLE

I. HEADING ONE

Iwonv wouoilkvn ueoi jfpioej gjv opkr kfasj kfkfjgvpok rkkfp oekfakpv kkp oikfk valfjvjo worul mlasu ojworuo ikcvl sjocmlz jfoweljlv. Asl;dfhal;skdjfsl. A;sldkjfa;lsdkjfa;sdlfj. Ipoia[weo'dvm'Z:d. a'seo;fa'weo;f'al/

A. Heading Two

Nwocjl wojovjslru ewhtitojlroelfj wodk to oxorenvno wowu eroivo wkfje wojo psdkfjerjtpod fjlfp wejvj fpoek. Pzpo wenvloufv moz eljvo ojel fjxoflme lghg hoiweVosur I Pohlsa jotjlel jvoiuwok rlc lhtoa upo fzpenb oelajflha.

B. Heading Two

1. Heading Three

Hwe orozv kno iaseutoia oflan roiaevnoa jeorjaoivalfjjoaer lvnlae jrtoiaer utoa hgoiajvl kanflkl zjvn aeoirutavha rt oiajv a htjaoiw ejgnari pwajoa jg noartu iatapwog:

- a. ado bj a lfjogj lgalf;
- b. wouo eiv a lrlj; and
- c. o jlgjla oruo ijg pjhgjl.

2. Heading Three Again

Gweor ivb ojvo seuroiae hgolna dkruoie a vnaoutoaeirpo iwpoq ytie fl zhvoey taolos eht govjsoiet yoeajag h kboiutojsldjg.

a. Qpvk Pcpell

Nwq oiruo noiwaur oi taori. We wooeton voi aeutoa toafjl a fknboae totj. Two ruonfoa euroan faeotjlvno paeut oah tlajt oathlajf.

b. Ieovjwopp

Me wruoiv uo inwoti uao iutoiw opyhnv oauro:Ewoir uonvoia wet uoaepto wae uriouviae yt oq wto eaituoavn i aeutoae utoierty ia euriovin ai eutua smcl zodptyi er hyoerw yaopsjvi..

Us v. Them, 123 SW2d 445 (Tex.Civ.App.--Dallas 1962,writ dism=d)

(1) Doc Hpnw

Mr qwotu bwcovni uqwyroi q eucjg to qwjfo qyeituo quro coqeu toi qweoou to qefmoqe utoqeut ou roadl jgoiwyi howyto ai egnv oete lj at oghae. Bqwe ioi vnkauti oue ri oteai jvonop aehtoia. We htoamv ia eytoi aeutopia jdo vnaie tyaoe tuoapeio.

(2) Pocwl Xi Gpxo

Pv maoply i uaeuroa heopigfo as fmvapoiv to aenti. A poegf oao pt yoap ieutoau oufopah t,vhuro ajvoayt oiuaaoe tu aovuo am porkp qeutogei vo pua optuop. Autopi aigoua o tuoaut oaeuotu ao eu vpouao eptipa uo:

- ;lsadkfjsdkfja;fkj
- ;alsdkjfdlkfj
- ;alsdkfjas;dlkfj

II. HEADING ONE

Njq ieurov nake to auovzji usdytl a vladhtoia er ytoajv lmak jytoa wkalditu ao iethoae ht opawek m vlhadityo uetiuj dvnia utyo. A wjlgmiyt oaj vmlk nakty oa iweoitj hoiak epmgv lm kaht oawjrotak valtj oamlvm lahtaeoi kat.

IV. HEADING ONE

So wroi vno aeituoaw tiaslcvk a ytioawe uto iae itgoj adkviase. Tuoi aeytoa sjfvkaiu tao weit yoaweguo a vmkjaer tiuear hkv lask ot upawoa touopzhvl kmaityam.



Your PowerPoint Presentation

You retain the individual copyright to your electronic presentations, allowing you to freely sell or otherwise distribute it and revise or republish it at will. The State Bar owns a copyright to the collected work in which your material will appear. Submission of your material grants the State Bar a nonexclusive license for the Bar's benefit to reproduce, sell, and otherwise distribute all or portions of your material under your name, individually or as part of collective and derivative works, through any media now known or that might be created.

TIPS FOR POWERPOINT PRESENTATIONS

A few statements about PowerPoint:

- Rule # 1)** A good speech doesn't necessarily need a visual presentation. Many of our highest-rated speakers don't use PowerPoint.
- Rule # 2)** If you don't know how to use PowerPoint, then don't use PowerPoint.
- Rule # 3)** If you use PowerPoint and have technical difficulties, **KEEP TALKING**. You should always be prepared to continue your speech with or without slides.

Standard Equipment We Provide: Laptop, Microphones (including lavaliere), Screen & Projector, Wireless Clicker and Audio connected to Laptop.

Slide Format: At the start of creating your presentation, set your slide size to Widescreen (16:9). To change or verify your setting, do the following.

Click on the **Design Tab > Slide Size > select Widescreen (16:9)**

Contrast: Use sharply contrasting colors such as black text on a white background or yellow and white text on a blue background. Pick a simple design - don't use busy patterned backgrounds. Keep in mind, that large ballrooms have a lot of ambient light that can wash out a projection screen - so deep colored backgrounds and red, orange or purple text can appear washed out and hard to read. Again, make sure there is plenty of contrast between your text and background.

Some Important "Don'ts"

- ✓ Don't drop beneath a 24pt font
- ✓ Don't use more than 6 bullet points per slide
- ✓ Don't use more than 8 lines of text per slide
- ✓ Don't use annoying animations or sound effects
- ✓ Don't read your slides

Don't use text-heavy material. If you wish to refer to an entire document, dense table/chart or any lengthy text, include it in your course materials.

Beware of hard-to-read fonts. Avoid using multiple fonts - your visual will look like a ransom note.

Use upper and lowercase letters. Long strings of capital letters are hard to read and you appear to be shouting.

Keep it simple. Use your PowerPoint to emphasize points - not to elaborate or fill in gaps. If your audience has to decipher your visuals - they are not paying attention to you. Use your slides to communicate additional information that you can't communicate with your voice or body.

Audio and/or Video Clips: *Audio and Video clips are risky.* Make sure the meeting coordinator for your course knows in advance that you have embedded video/audio in your PowerPoint. If you email the presentation, you should save the presentation and save the clips again, separately (they won't come thru email embedded). Follow-up with a phone call to make sure everything works. The safest procedure is to prepare your presentation on a laptop, bring that laptop to the course, and check-in with our registration desk well before your speech so we can pre-load and test.

Don't use video or music solely for "entertainment". In other words, video clips should compliment or illustrate points you are making in your CIE presentation.

Benefits for Volunteers Who Participate in TexasBarCLE Courses

We appreciate the time and expertise you are sharing to make our courses possible. In addition to our heartfelt thanks, we would like to offer you the following benefits to show our appreciation for your donation of valuable knowledge.

What Speakers, Authors, and Course Directors Receive

1. **Complimentary course registration** to the course for which you are speaking and/or writing.
2. **Complimentary course materials for the course** for which you are speaking and you get your choice of a printed book or a PDF download (hyperlinks to each article and the ability to search all articles at once).
3. **Complimentary one year subscription to our Online Library**, an ongoing collection of over 25,000 high-quality CLE course articles saved as PDFs that can be searched by keywords or you can browse the articles for any given course. Once you find what you want, you can view it online or download it for later reading or printing.
4. **Speakers and Course Directors: Reimbursement for reasonable and necessary travel expenses to the course**, including mileage or airfare (and related costs (parking, tolls, taxi, etc.), hotel stay for one night per day you appear on the program (unless you live in the county or contiguous county where the course is held), and meal expenses up to \$40/day.
5. After the course, complimentary online **access at TexasBarCLE.com to online video** replays of each presentation and to PDFs of the individual course book chapters to view, download and search.

What Planning Committee Members Receive

1. **Reimbursement for reasonable and necessary travel expenses to and from the Planning Meeting for the course**. This includes mileage or airfare (and related costs (parking, tolls, taxi, etc.) and meal expenses while traveling, if any, up to \$40. (Because Planning Meetings are fly-in fly-out affairs, we do not usually reimburse for hotel stays.)
2. **Complimentary course registration** to the course you help to plan.
3. **Course materials as a printed book and a PDF download.**
(hyperlinks to each article and the ability to search all articles at once).
4. **After the course**, complimentary access to online video replays of each presentation and to PDFs of the individual course book chapters to view, download and search.

For more information on being a TexasBarCLE Volunteer,

Visit our Volunteer Resources Site at:

www.texasbarcle.com/materials/special/Volunteer_Resource.pdf

Getting the Benefits for Participating in TexasBarCLE Courses

1. Course Registration

- **Speakers:** Our staff will register you for the course. The onsite TexasBarCLE staff will have a name tag for you at the registration table.
- **Planning Committee Members:** *Registration is not automatic.* Please contact the TexasBarCLE Registration Department at 800-204-2222 x1574 to register for the course. Inform the operator at the time of your registration the name of the course you assisted in planning.

2. Course Materials

Along with your name tag, the staff will give you the course materials in the form of a **printed book** or a **PDF download** (hyperlinks to each article and the ability to search all articles at once).

3. Online Library

Search, View and Download Over 25,000 CLE Articles!

TexasBarCLE maintains an ongoing collection of thousands of high-quality CLE course articles in PDF format that can be searched by keywords or you can browse the articles for any given course. Once you find what you want, you can view it online or download it to print or read later. [How to Get Complimentary Access to the Online Library.](#)

4. Video Replays of Each Presentation

Shortly after the course, we'll send you an email letting you know this benefit is available and how to get complimentary online access to these presentations.

5. Getting Reimbursed For Your Expenses

TexasBarCLE is happy to reimburse speakers for all **actual out of pocket, reasonable, and necessary expenses** for speaking and traveling to and from the course.

- Ensure that your expenses are reimbursed at the 100% rate by making yourself aware of TexasBarCLE's *Reimbursement Guidelines* **BEFORE** incurring any expenses.
- **If you anticipate a large or unusual expense**, call the Program Coordinator ASAP.

➤ Meals

TexasBarCLE does NOT pay speakers a per diem. Meal reimbursements are for actual and reasonable expenses up to \$40/day. When paying for a meal with a credit card, you typically receive:

- one receipt showing each item purchased and
- a second "signature" receipt for the total with a blank for a tip.

Please turn in **BOTH** receipts with your reimbursement request.

➤ Airfare Expenses

We **cannot reimburse for first or business-class** airfare. Also, please note that waiting until shortly before the course begins to make your airfare reservations can easily increase airfare to the point that we may not be able to reimburse you 100% because it's no longer considered to be "reasonable."

- One last-minute ticket may cost as much as two nonrefundable tickets booked in advance.
DON'T RISK IT - make your airline reservations at least 30 days before your travel date!

- **Unsure of your travel plans?**
If you are concerned about having to change or cancel your travel plans, it's often much cheaper to go ahead and book the flight. If you have to pay a fee to change or cancel your tickets, we will reimburse you for those fees as long as you didn't wait until the last minute to book your flights.

- **Hotel Accommodations**
We reimburse *one night's lodging* at the negotiated room rate (which appears in the [Author's Packet](#) and in the course brochure) *for each day you appear on the program*.

If there are *compelling circumstances* that make it necessary for you to stay longer, **seek prior approval** from the Texas BarCLE Program Planner or Program Coordinator.

- **Residing in the County Where the Course is Presented, or in a Contiguous County**
State Bar policy prevents us from reimbursing you for lodging *if you reside in or practice law in the county in which the course is presented, or in a county contiguous to that county*. If there are compelling circumstances, please contact the Program Coordinator in advance of the course.

For more information on being a Texas BarCLE Volunteer,

Visit our Volunteer Resources Site at:

www.texasbarcle.com/materials/special/Volunteer_Resource.pdf

What We Can Reimburse You For

- ✓ Meals—up to \$40 per day
- ✓ Air travel other than first class/business select
- ✓ Early-Bird Check-In and Baggage Fees
- ✓ Personal car—.56 cents per mile
- ✓ Rental car—use discount code to get State of Texas rates for SBOT business use for up to Intermediate car type. Please refuel before returning.
 - ▶ Enterprise (TXSOT, PIN is STA)
 - ▶ Hertz (2162531)
 - ▶ Avis (F999202)
- ✓ Vonlane—Use code TXBAR10
- ✓ Parking
- ✓ Taxis / ridesharing services
- ✓ Lodging at the State Bar rate at the host hotel—one night for each day you appear on the program
- ✓ Tips

What We Can't Reimburse You For

- ✗ Airfare that is first class/business select or booked less than two weeks from the program/ planning meeting (without prior approval)
- ✗ The cost of outside printing for articles and handouts. Even if it's late, please contact us as we can always do it much less expensively.
- ✗ Bar drinks or entertainment
- ✗ Expenses associated with a spouse, co-author, assistant, or other guests of yours
- ✗ Limo / town car service
- ✗ Lodging, if you live in the same county as the seminar

In general

We will cover your reasonable out-of-pocket costs. And because we're trying to keep registration fees and bar dues as low as possible, we'd appreciate your help in keeping costs down—for example, by booking air travel early, taking a taxi/rideshare rather than a limo service or renting a car, etc.

Our auditors require all receipts—i.e., the credit card receipt and the detailed restaurant receipt. Tips don't require receipts.

Often it helps us if you clarify an expense. For example, if you turn in a receipt for an especially large amount, please specify how much of it you are asking to be reimbursed for.

If you have an unusual expense—because of, say, the poshness of the host hotel or the difficulty of your travel schedule—please save us a phone call to you and write a note why on the form.

Questions? Call Clint at (800) 204-2222, ext. 1796.

Mail in this form with receipts within 30 days of the event to:

**TexasBarCLE Reimbursement Coordinator
P.O. Box 12487, Austin TX 78711-2487**

Thank you!

PLEASE PRINT

Request for Reimbursement of Expenses

If you are seeking reimbursement for speaking on the same program at more than one location, please use a separate request form (or a photocopy) for each location. Thank you!

Name **(Please print)** _____ Bar Card No. _____ Date of Request _____
 Make check payable to (if other than above): _____ Phone (____) _____
 Address _____ City / State / Zip _____
 Date(s) of travel _____ Location of program / meeting _____
 Name of program / meeting _____

Transportation *See other side*

Public carrier (airline or other) _____ \$ _____
 Use of personal automobile: _____ miles at the applicable rate per mile* = \$ _____
*.575¢ for travel on or before 12/31/20; .56¢ for travel after 1/1/21
 Taxi, airport bus, shuttle, etc.: _____ \$ _____

Meals & Lodging *\$40 per day for meals† 1 night's stay for each day you appear on a program*

Date	Breakfast	Lunch	Dinner	Hotel	Daily Total
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

† If you use a credit card for a meal, attach BOTH receipts; see other side.

Total for Meals & Lodging \$ _____

Other Expenses *See other side*

_____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____

Total Reimbursement Requested \$ _____

I incurred the expenses described above for the purpose stated.

I attached receipts except in cases where the receipt has been lost.

Requestor's signature

FOR USE BY STATE BAR STAFF ONLY

Fund	Course	Expense	Location	Date	
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	_____	\$ _____
Grand Total					\$ _____

Approved for payment by _____
 Date approved for payment _____

How to Get Your Complimentary Access to the **TexasBarCLE Online Library**

- Go to www.TexasBarCLE.com
If you are already registered with this site, please proceed to the next step. If you are *not* a registered user of the site, select the “**Login**” button and follow the registration instructions under “**New User.**”
- Go to the “**Contact Us**” page:
<http://www.texasbarcle.com/cle/AAContactUs.asp>
- Under # 1, choose “**Need help with Online Library.**”
- Under # 2, please type “**Volunteer Comp Subscription.**” Also include **your full name, Bar Card number, and the name of the course for which you are writing/ speaking.**
- # 3 should be filled in with the email address used when you registered with the site. If you wish to be contacted at a different email address, please change it here.
- We will send you an email to let you know that your complimentary one-year subscription has been activated (if you already have a subscription, your subscription will be extended by a year).

Questions/ Problems? Call the Bar at 800-204-2222 ext. 1749.



Paying a lot for online legal research?

Get it for **FREE** instead.

From **TexasBarCLE**

TexasBarCLE offers unprecedented free access for State Bar of Texas members to two nationwide legal research services, **Casemaker** and **Fastcase**.

The services are similar in scope and range but differ in look and feel, search interfaces, and advanced features. Some attorneys may prefer one over the other, and some will use both, finding features they like in one not present in the other.

Casemaker provides all Texas attorneys with the law of all 50 states as well as federal law, including the Texas Administrative Code, Texas attorney general opinions from 1947, Texas case law since 1886, state constitutions, Texas session laws since 1995, state court rules, and Texas revised statutes including annual archived versions since 2001.

Casemaker's expanded offerings include access to premium services (**Casecheck+**, **CiteCheck**, and **CasemakerDigest**) at no cost to State Bar members. These services were previously available only to paid subscribers. Casecheck+ validates your research and identifies whether or not your case law citations are still good law. CiteCheck is a brief analyzer that lets you upload a brief or pleading and receive within 90 seconds a report stating whether your case citations are still good law. CasemakerDigest delivers daily summaries of state and federal appellate cases customizable by jurisdiction and subject matter.

Fastcase bases its offerings on firm size. For firms of 11 lawyers or more it offers free access to its extensive **Texas Plan**, including opinions of the Supreme Court of Texas and courts of appeal back to 1 Tex. 1 (1846), U.S. Supreme Court opinions back to 1 U.S. 1, Fifth Circuit opinions back to 1 F.2d 1, the U.S. Code annotated, the Texas Statutes annotated, the Texas Constitution, and 70 other Texas-specific legal research libraries.

For solo practitioners and firms of 10 lawyers or fewer, Fastcase offers free access to its **Premium Plan**, including all libraries in the Texas Plan, plus nationwide coverage from state and federal courts, state statutes and administrative regulations, as well as court rules, constitutions, and other valuable libraries.

For all Texas attorneys, Fastcase offers free access to annotated statutes from other states, Fastcase's annotated U.S. Code, transactional access to newspaper articles, federal court filings, and legal forms, and transactional access through HeinOnline to the largest collection of law reviews in the world.

A popular feature of Fastcase is its visual interactive timeline map of search results – a bubble chart that lets you see the most important cases at a glance as opposed to scrolling down a long list of text search results.

State Bar of Texas members will also have access to Fastcase's and Casemaker's intuitive legal research tools, training webinars and tutorials, mobile apps, and live customer support.

Check out these services for yourself by logging on to **TexasBarCLE.com**.

Customer Support

Casemaker
(877) 659-0801
support@casemakerlegal.com

Fastcase
(866) 783-2782
support@fastcase.com



STATE BAR *of* TEXAS

Events and Conferences Code of Conduct

Welcome to your State Bar of Texas event. Our goal is to provide a professional, harassment-free event experience for everyone, regardless of race, sex, color, religion, national origin, age, military and/or veteran status, sexual orientation, gender identity, gender expression, disability, or any other characteristic protected by applicable federal, state, or local law.

All participants at our events, meetings and conferences are requested to abide by the following code of conduct. "Participants" include attendees, speakers, volunteers, exhibitors, and staff. Cooperation from all participants helps ensure a safe environment for everyone.

Harassment of event participants will not be tolerated in any form. Sexual imagery, acts, language, innuendos, and propositioning are not appropriate for any conference venue. Anyone violating these rules may be expelled from the event without a refund at the discretion of the conference organizers.

At a State Bar of Texas event, you agree to the following:

- Respect the boundaries of other participants.
- Uphold a high standard of professionalism and ethical conduct.
- Conduct yourself in a way that reflects favorably on the legal community.
- "If you see something, say something."

These behaviors do not belong at a State Bar of Texas event:

- Sexual harassment of any kind, including unwelcome sexual attention, proposition, inappropriate physical contact, showing lewd photographs or videos or pornography.
- Racist, sexist, homophobic or other behavior that discriminates against a group or class of people.
- Being disruptive, drinking excessively, stalking, or threatening anyone.
- Invasion of privacy, including taking photos of or with people without their consent.
- Abuse of power (including abuse related to position, wealth, race, or gender).

Reporting

If you or anyone else experiences harassing or other inappropriate conduct, please report it as soon as possible to an onsite State Bar staff member. When taking a report, our staff will ensure you are safe and cannot be overheard. They may involve other event staff to ensure your report is managed properly. The staff member will ask you about what happened. This can be upsetting, but we will handle it respectfully, and you can bring someone to support you. You won't be asked to confront anyone, and we won't reveal your identity to anyone without your permission.

STATE BAR *of* TEXAS

Event staff will exercise their discretion to take appropriate action to address the behavior. Staff can also help you contact hotel/venue security or otherwise assist you to feel safe for the duration of the event.

If you have a complaint about inappropriate behavior by an event staff member, you can report the incident to another onsite staff member or call State Bar Human Resources at (512) 427-1489 or the State Bar Legal Counsel's Office at (512) 427-1552.

If you are the victim of or observe any criminal behavior, contact appropriate onsite security personnel and/or call local law enforcement.

Consequences

Participants asked to stop any harassing behavior are expected to comply immediately.

If a participant engages in harassing behavior, event staff retain the right to take any actions to keep the event a welcoming environment for all participants. This includes warning the offender or expelling the offender from the event without a refund.

Event staff, in their discretion, may take action to redress anything designed to, or with the clear impact of, disrupting the event or making the environment hostile for any purpose.

Political Endorsement/ Electioneering, Participation of Candidates, and Candidate Impartiality

EFFECTIVE JANUARY 29, 2008

Thanks in advance for graciously volunteering to help plan and present this course. Before participating in a TexasBarCLE course, we request that all Course Directors, authors, speakers, moderators and anyone else participating in the course please read the following:

Please Don't Endorse Candidates, Electioneer, or Campaign

Authors of written materials and all Course Directors, speakers, moderators, and anyone else participating in a TexasBarCLE course may not endorse political parties or candidates. This includes, but is not limited to, doing any of the following while speaking:

- (1) wearing or displaying any promotional political materials;
- (2) referencing one's campaign or opponent; and
- (3) referencing that a speaker is a candidate for office during an introduction or otherwise.

On the other hand, robust discussion of controversial issues regarding the law, legal process, law practice, and law practice management is considered a valuable educational tool at TexasBarCLE events.

Your participation in a TexasBarCLE course is a representation by you that you read, understand, and agree to the above prohibitions.

This policy shall be enforced uniformly by TexasBarCLE staff without exception, and can be modified only by the State Bar of Texas CLE Committee.

Violations of the prohibitions described above that are brought to the TBCLE staff's attention will be reported to the State Bar of Texas Continuing Legal Education Committee and to future Planning Committees.

If you have any questions, issues or concerns about the above, please contact the course Program Planner at 800-204-2222, ext 1574 as soon as possible.

The attorneys of Texas are greatly indebted to volunteers like you who unselfishly dedicate enormous amounts of time and effort to educate their colleagues. Thanks again and we look forward to working with you on this course!

Public Officials and Candidates for Public Office May Participate

All candidates for public office, opposed or not, and all elected or appointed public officials may be invited to participate as Course Directors, Planning Committee members, or speakers for any TexasBarCLE course.

State Bar of Texas Policy of Candidate Impartiality

The State Bar of Texas does not endorse political candidates. When a candidate for public office is included in promotion for or participates in a TexasBarCLE event, the State Bar is not taking a position for or against anyone's candidacy.

This Policy will appear in (1) brochures and on a PowerPoint slide at the beginning of every course and (2) the Guidelines for the Preparation of Written Materials document, which goes to all authors of course materials.

