



CONTINUING LEGAL EDUCATION  
REGULATORS ASSOCIATION



**2024 ANNUAL MEETING**  
**August 11- 13, 2024**  
**Chicago, IL**

**HOTEL CHICAGO**  
**333 N. Dearborn**  
**Chicago, IL 60654**



**[WWW.CLEREG.ORG](http://WWW.CLEREG.ORG)**

# CLEREG EXECUTIVE COMMITTEE

President: Jennifer Rickman, Montana

Vice President: Dawn McKnight, Colorado

Treasurer: Michele Wojciechowski, Tennessee

Secretary: Liz Vanderbeek, Minnesota

Past President(s): Maria Molinelli Gonzalez, Puerto Rico & Dawn McKnight, Colorado

## PLANNING COMMITTEE

A big thank you to our planning committee for their efforts to bring our members quality education and networking opportunities!

Melissa Shultz, Kansas (Chair)

Katey Buggy, Pennsylvania

Amy Frogge, Tennessee

Elise Geltzer, New York

Jenny Hubach, Emeritus

Karen Johnson, Illinois

Dawn McKnight, Colorado

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Jennifer Rickman, Montana

Shelley Sutton, Kansas

Liz Vanderbeek, Minnesota

Michele Wojciechowski, Tennessee

## ANNUAL CONFERENCE SPONSORS

Sunday Evening Welcome Reception - Sponsored by the Illinois Supreme Court MCLE Board

Monday Breakfast - Sponsored by the Kansas CLE Commission

Monday Luncheon - Sponsored by the Montana Commission of CLE

### Other Sponsors

Tennessee Commission on Continuing Legal Education

Utah Supreme Court Board of Continuing Legal Education

**Thank you to all of our Sponsors!**

# CLEREG CONFERENCE SCHEDULE

**Sunday, August 11, 2024**

## Pre-Conference Activities:

- 10:30**      **Executive Committee Meeting**  
**12:00**      **Committee Meetings** - (More Information to come)  
**4:00 - 4:45**      **New Member Orientation** - (5 years or less of experience)  
**5:00-6:00**      **Networking Social** Sponsored by MCLE Board of the Illinois Supreme Court
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**Monday, August 12, 2024**

- 7:30-8:30**      **Breakfast**  
**8:30-8:35**      **Opening Remarks** - Jennifer Rickman, CLEREG President  
**8:35-8:45**      **Welcome to Chicago** - Justice P. Scott Neville, Illinois Supreme Court  
**8:45-9:45**      **Board Meetings, Part 2!** - Timothy Shultz, Associate General Counsel, Stormont-Vail Health  
This presentation is a sequel to last year's presentation, "Board Meetings: How to Run One, How to Onboard, & How to Use Board Meeting Apps." This presentation will go deeper into how to, and how not to run a board meeting. Topics, such as how to handle the discussion monopolizer, how to run an effective board meeting when crickets seem to be participants, how to strategically develop relationships with board members, or how to deal with serious issues in the agency/organization that need to be dealt with by the board.
- 9:45-10:45**      **Break**  
**10:00-12:00**      **CLE-APLOOZA** - Dan Levering, CLE Administrator, Pennsylvania & Shelley Sutton, CLE and Attorney Registration Director, Kansas  
This roundtable session allow for the sharing of updates and ideas to help regulators return to their offices more informed and able to meet the responsibilities of efficient MCLE administration. Participants will learn about current regulatory challenges (and opportunities) in other states while sharing information on recent developments in their own jurisdiction. This session will apply an interactive approach to identify areas of common interest and categorize them for collaborative review. We hope you can join us for a regulatory round-up that includes a diverse festival subjects such as: Technology, Rule & Regulation Changes, Provider Relations, Funding and Fee Schedules, Board and Commission support and more.
- 12:00-1:00**      **Awards and Networking Luncheon**  
**1:00-2:00**      **Cultivating a Professional Ecosystem: Innovative Tools and Initiatives for Holistically Promoting Legal Professionalism** - Erika Harold, Executive Director, Illinois Supreme Court Commission on Professionalism  
The Illinois Supreme Court established the Commission on Professionalism as an aspirational entity to promote integrity, professionalism, and civility among Illinois' lawyers and judges. Recognizing that professionalism must be fostered holistically to change mindsets and behaviors, the Court empowered the Commission to create professionalism resources for law students, lawyers, judges, court personnel, and the public. The Commission's Executive

**\*\* All times reflected in CST.**

## Monday, August 12, 2024 (cont):

Director, Erika Harold, will share some of the innovative programs the Commission coordinates to fulfill this board mandate and describe how this multi-faceted approach to professionalism ecosystem. She will also preview some of the Commission's newest initiatives, including a significant new initiative to assess the prevalence and impact of bullying in Illinois' legal profession and recommend best practices for preventing it. This is believed to be one of the first wide-scale research projects conducted in the U.S. on this topic.

**2:00-2:15** Break

**2:15-3:15** **Getting Things Done** - Danielle Hall, Chief of Professionalism & Outreach, Kansas Office of Judicial Administration

Any given day of the week, many of us are managing multiple projects and tasks at the same time. This juggling act, however, can lead to increased stress, missed deadlines, and mistakes when we are not managing our time or technology well or when there is a lack of systems and processes in place to get the job done. During this session, we will discuss how to utilize technology and implement workflows to make your job easier, more efficient, and less stressful. Attendees will learn time management techniques and technology tips to help them maximize their time and focus.

**3:15-3:30** Break

**3:30-4:30** **Working Smarter, Not Harder** - Danielle Hall, Chief of Professionalism & Outreach, Kansas Office of Judicial Administration

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## Tuesday, August 13, 2024

**7:30-8:15** **Breakfast & Annual Business Meeting**

CLEreg Board Elections  
Passing of the Gavel  
Committee Reports

**8:30-9:30** **Re-Imagining CLE** - Graham McMahon, MD, President & CEO, Accreditation Council for Continuing Medical Education (ACCME)

While legal and medical education share common challenges, the organization and administration of their continuing education systems between the professions differ substantially. In this presentation, Graham McMahon MD, the CEO at the national regulator for continuing medical education (CME) will outline how CME is overseen, how innovation and educational evolution are facilitated, how learner preferences are changing, how individual competency is determined, and how data is shared and managed. Lessons learned from managing the growing CME ecosystem that could inform the next steps for CLE include opportunities to harmonize requirements, designate a central approver for cross-state activities, have a national credit be able to digitally flow between states, and move away from review-and-approval of activities and towards trust-and-verify approach.

**9:30-9:45** Break

**9:45-10:45** **Crisis Management** - Dawn McKnight, Deputy Regulation Counsel, Colorado & Stephanie Smith, Judicial Administrator, Kansas

**10:45-11:00** Break

**11:00-12:15** **Long Range Planning Update** - CLEreg Long Range Planning Committee

**12:15** **Conference Wrap-Up**

**Safe Travels!**

# SPEAKER BIOGRAPHIES



## DANIELLE HALL

Danielle Hall currently serves as the Chief of Professionalism and Outreach with the Kansas Office of Judicial Administration. She previously served as the Executive Director of the Kansas Lawyers Assistance Program and as a Deputy Disciplinary Administrator with the Kansas Office of the Disciplinary Administrator. Much of her career has been dedicated to service to the public and improving the practice of law by tackling issues surrounding the connection between well-being, law practice management, and ethics and professionalism in the profession. She uses her background in each of these areas to focus on education and outreach for judges, attorneys, law students, and judicial employees.

Danielle currently serves as President-Elect for the Institute for Well-Being in Law, President-Elect of the Kansas Women Attorneys Association, and is the District 5 Rep on the Kansas Bar Association Board of Governors. She also serves as the Chair of the Kansas Bar Association Law Practice Management Committee and is a member of the Kansas Bar Association Ethics Advisory Committee. She is also an active member in the ABA Law Practice Division, having served on several committees, and is a regular contributor to the Product Watch column of the LP Division's Law Practice Magazine. In her free time, she serves as an adjunct professor at Washburn School of Law, teaching law practice management and assisting with the Intensive Trial Advocacy Program and coaching the competition teams. Danielle received her J.D. in 2009 from Washburn School of Law.



## ERIKA HAROLD

Erika N. L. Harold is the Illinois Supreme Court Commission on Professionalism's Executive Director. An advocate for civility, ethics, and inclusion, Erika leads the Commission's extensive educational programming focused on advancing professionalism among the state's lawyers and judges to build confidence in the justice system.

Before joining the Commission, Erika was a litigation attorney at Meyer Capel, P.C. in Champaign, Illinois, representing clients at the trial and appellate levels in disputes regarding fiduciary and contractual obligations.

Earlier in her career, Erika was a litigation attorney at the Chicago offices of Sidley Austin LLP and Burke, Warren, MacKay & Serritella, P.C., representing businesses in commercial disputes and advising religious institutions on First Amendment issues.

Erika graduated from Harvard Law School, where she won a Boykin C. Wright Memorial Award for appellate advocacy in Harvard Law School's acclaimed Ames Moot Court Competition. She funded her legal education through the scholarships and appearance fees she earned as Miss America 2003. Erika received a political science degree from the University of Illinois Urbana-Champaign, graduating Phi Beta Kappa and as a Chancellor's Scholar.

Erika previously served on the Illinois Supreme Court Committee on Equality, and on the board of Prison Fellowship, a national faith-based nonprofit that serves the incarcerated and advocates for criminal justice reform. Erika also served on the boards of Trinity International University and Champaign County CASA (Court Appointed Special Advocates).

Erika has been active in Illinois politics, running for Attorney General, and was a panelist at Fortune Magazine's "Most Powerful Women, Next Gen" conference.

Erika is currently leading the Commission on Professionalism's Bullying in the Legal Profession initiative, which is believed to be one of the first wide-scale research projects in the U.S. on this topic.



### **GRAHAM MCMAHON, MD, MMSC**

Graham McMahon, MD, MMSc, is the President and Chief Executive Officer of the Accreditation Council for Continuing Medical Education (ACCME), which accredits continuing medical education (CME) providers in the US and internationally, creating a framework that supports, inspires, and motivates educators to achieve their full potential. Dr. McMahon leads initiatives to accelerate learning, change, and growth, enabling clinicians and interprofessional teams in practice to optimize their performance and continuously improve care for patients, families, and communities. In addition to his role at the ACCME, Dr. McMahon serves as an Adjunct Professor of Medicine and Medical Education at Northwestern University Feinberg School of Medicine teaching medical students and fellows and continues to care for patients with endocrine disorders at Howard Brown Health in Chicago.



### **TIMOTHY SHULTZ**

Timothy A. Shultz received a B.A. degree from Washburn University with a double major in history and political science and a minor in English literature. Tim received his J.D. degree from Washburn University School of Law in 1993 and was admitted to practice in Kansas State and Federal courts. After having been a partner in a number of firms over the years, most recently serving as the Managing Partner of Goodell, Stratton, Edmonds & Palmer, LLP in Topeka, KS, he recently went in-house with Stormont Vail Health, a Northeast Kansas health system comprised of two hospitals, a number of specialty and primary care clinics and surgery centers. Prior to going in-house, Tim had a diverse practice across the middle-United States and was licensed to practice in Districts of Kansas, Nebraska, Minnesota, and Missouri, the Eastern and Western Districts of Arkansas, the Western District of Missouri, U.S. District Courts of Colorado, Western District of Oklahoma, and the Tenth Circuit Court of Appeals. His private practice included business, banking and transactional law, insurance and professional liability defense litigation, financial institution bonds, professional liability, employment and civil rights law, construction law, healthcare law, and general corporate law. In 2011 and again in 2013, the Kansas Governor appointed Tim to serve on the Kansas Racing and Gaming Commission, which regulates the pari-mutual racetracks and State-owned casinos in Kansas. In July, 2013, the Governor appointed Tim Chairman of the Kansas Racing and Gaming Commission. Tim has volunteered his time and expertise for a number of non-profit organizations in the mid-west and has advised and served on a number of private corporation and non-profit boards.



## **STEPHANIE SMITH**

Stephanie Smith is the Judicial Administrator of the Kansas State Court System. She was previously the Chief Financial Officer for the Kansas Judicial Branch. In this role, she directed the fiscal office and its accounting functions, including overseeing the approximately \$192.5 million budget for the Kansas Judicial Branch. Previously, she worked as a certified public accountant for Mize Houser and Company, PA. Smith also has prior judicial branch experience working as a research attorney for the Kansas Court of Appeals. Smith serves on the NCSC Court Consulting Services Advisory Committee and is the planning chair for the Kansas CPA Society Conference on Kansas Taxes. She has a Bachelor of Business Administration Accounting degree from Washburn University, a law degree from the Washburn University School of Law and a Master of Laws degree from the University of Missouri-Kansas City School of Law.