

# Presenting Excellence



PENNSYLVANIA BAR INSTITUTE  
*Continuing Education Arm of the Pennsylvania Bar Association*



BRINGING EXCELLENCE TO CLE

# **Table of Contents**

PBI Course Planner Guidelines .....	2
Authors' Checklist .....	4
PBI Course Manual Guidelines .....	6
Effective PowerPoint Tips .....	19
Successful Presentation Tips .....	20

# **Welcome Aboard**

Thank you so much for your willingness to serve as a course planner or faculty member for the Pennsylvania Bar Institute. We want you to know that we recognize you are generously volunteering your valuable time and talents.

To make your job as easy and rewarding as possible, we have prepared this booklet as a guide for you. It is our hope that it will answer many of your questions about developing our program, preparing written materials, and teaching for PBI.

Your PBI team is prepared to provide you all of the support you will need. We hope you will enjoy your experience as a PBI faculty member. Together we will achieve excellence in CLE.

# **Commitment to Diversity**

PBI believes that no commitment to excellence in our educational mission would be complete without the variety of viewpoints that we can provide with a diverse group of speakers and authors presenting our seminars.

We believe we can better achieve our goal of recruiting the best attorneys in Pennsylvania if, together, we make a special effort to reach out to more minority and female attorneys throughout the Commonwealth.

Our Board of Directors adopted a Diversity Policy which says, in part:

PBI promotes diversity in its activities, including

- election to its Board of Directors
- selection of course planners, faculty and authors
- employment of its staff
- participation in its seminars, publications, and other educational activities
- choosing its vendors

PBI does not maintain or practice any policy, whether formal or informal, that has the potential of fostering or resulting in discrimination on the basis of race, color, religion, national origin, gender, sexual orientation, age, disability, or any other legally protected characteristic.

PBI staff will assist you in identifying attorneys to help achieve these objectives.

# PBI Course Planner Guidelines

## **Planning**

*In consultation with the PBI staff, course planners:*

1. Identify course level and objectives.
2. Develop a course outline and title.
3. Recommend possible faculty members.
4. Develop a creative, interesting course format.
5. Participate actively in the planning meetings/  
conference calls.
6. Assist in developing the course manual.
7. Note your presentation and/or materials may be  
selected for our Online Campus
8. Assist in the development of a marketing  
description of the program scope and content.
9. Assist in keeping the course development  
schedule on track.

## **The Presentation**

To provide continuity, we generally ask the course planner to serve as moderator at each live presentation.

The following are some helpful moderating tips:

1. Give a very brief introduction of each faculty  
member, i.e., name and firm.
2. Explain how questions from the audience will be  
handled.
3. Keep the program on schedule.
4. Clarify and reinforce particularly significant points.
5. Remind the audience once or twice to complete  
the course evaluation forms.

6. Prepare remarks to make the transition between topics.
7. Be relaxed and achieve excellence by using a conversational style.

### **After the Presentation**

1. Post-course analysis
2. Express appreciation to faculty members.
3. Review course evaluation summaries provided by PBI staff.
4. Notify your staff attorney or program manager of any errors you find in the course manual and of any significant changes in the law that arise after publication.

### **Additional PBI Resources with a minimum of two weeks notice...**

1. PBI can produce PowerPoint software presentations for your course.
2. PBI's experienced video staff can record video vignettes to use in your program.
3. PBI's graphics department can produce large charts, exhibits, and other audiovisual aids.
4. PBI also has state-of-the-art electronic typesetting capabilities and continues to explore the Internet and other technological tools for effective delivery of CLE.
5. PBI has an extensive variety of course materials from related courses that may be of use in planning your course.

# Author's Checklist

When preparing your chapter, please keep in mind that the course book in which your materials will be published will also be sold to those who have not attended the program. Therefore, it is important that your chapter be a complete representation of your topic.

In addition to the excellent information contained in the enclosed "PBI Authors' Guidelines," please see the list below for answers to frequently asked questions. This information will help you to achieve your goal of providing a first-rate chapter for the PBI course book.

## **What Should Be Included in My Chapter?**

- Your text should be an accurate, substantive, well-annotated chapter, 20–25 pages in length.
- Appendices can include original material such as checklists, charts, graphs, bibliographies, and forms not available elsewhere. If your appendix is more than 25 pages, please contact the staff attorney or program manager administering your CLE program.
- Your PowerPoint slides will be added as an appendix to your substantive chapter. PowerPoint slides are NOT an acceptable substitute for your chapter.
- If you submitted copyrighted material by another publisher, it should be of good quality (no faxes) and include the title of the publication in which it appears and the name and address of the publisher.

### **What Should *Not* Be Included in My Chapter?**

- Copies of material that is readily available elsewhere such as cases, statutes or regulations.
- Any material that has color as a component, because PBI books are printed in black and white.
- Newspaper articles from major newspapers because reprint permission costs are generally prohibitive.

### **What Software Should I Use to Prepare My Chapter?**

- Microsoft Word is preferred; WordPerfect is acceptable.

### **How Do I Format My Chapter?**

- An extended outline format is preferred. Please refer to the enclosed PBI Authors' Guidelines for instructions (see page 10 of this booklet).

### **How Do I Submit My Chapter to PBI?**

- Please e-mail your chapter to the staff attorney or program manager administering your CLE program. If you cannot email, please mail a hard copy of your chapter and include a floppy disk or CD with your materials on it.

# **PBI Course Manual Guidelines**

## **Congratulations!**

You have been selected as a PBI author because of your reputation as an expert in your area of practice and as an effective communicator.

The mission of the Pennsylvania Bar Institute is to provide Pennsylvania lawyers with continuing legal education that is timely, practical, cost effective, and of the highest possible quality. Thanks to qualified professionals like you, we are able to provide quality courses through your generous contributions of time and expertise.

## **Your Responsibility**

We, and more importantly, your readers, rely on you to assure the accuracy of the material you submit. We expect that your article will be balanced and fair. Unless you are coordinating with another author who is providing an opposing viewpoint, you should not write as an advocate; rather, you should explain the current state of the law without editorial comment. If you are not submitting an original manuscript, your responsibilities remain the same for reviewing and updating the content of materials originally prepared by someone else.

## **What Do Lawyers Want?**

Lawyers rely on PBI books for practical and accurate information. Your chapter should be substantive, well-annotated, and approximately 20–25 pages in length. While PowerPoint is an effective presentation tool, it is not

a substitute for thoroughly written materials. Please keep in mind when preparing your chapter that the course book in which your materials will be published may also be sold to those who did not attend this program. Therefore, it is important that your chapter be a complete rendering of your topic.

## **FORMAT**

### **Composition**

Edit your writing ruthlessly! Use plain English and short sentences and paragraphs. Avoid all useless, misleading, and antiquated legal expressions, (for example, “whereas” and “thereof,” “such” (when used for this, that, these, or those), “said,” etc). Use verbs in the active voice rather than the passive and avoid use of the subjunctive (for example, “it appears,” rather than “it would appear”). Latin phrases should be used only when necessary.

PBI prefers chapters prepared in Microsoft Word but WordPerfect is also acceptable. We also welcome PDF files (Adobe Acrobat). The best method of submission is by e-mail. If you cannot e-mail your material, mail a hard copy of your chapter and include a floppy disk or CD of your materials.

### **Title Sheet**

The title of the chapter and author’s name and firm should be typed on a separate sheet of paper. **Do not** type this information on the first page of text.

### **Cross-References**

We encourage cross-references to assist the reader in locating all relevant information. Because the book as a whole will be assembled and paginated by PBI, the page

numbers on the manuscripts you and the authors of other chapters submit will differ from those in the book.

### **Appendices**

**If you include material copyrighted by another publisher, inform PBI as soon as possible** to allow time to obtain reprint permission. To reproduce the material, we will need a clean, good-quality copy of the material (no faxes), the title of the publication in which it appears, and the name and address of the publisher.

**Do not include** copies of material that is readily available elsewhere, such as cases published in reporters, advance sheets, or statutes, rules, or regulations that have been published.

**Do not include** any material that has color as a component, as PBI books are printed in black and white.

**Do not include** newspaper articles from major newspapers, as reprint permission costs are generally prohibitive.

Appropriate appendices include original material such as checklists and bibliographies, forms not readily available elsewhere, important slip opinions just issued within recent days, and PowerPoint slides. As a reminder, PowerPoint slides are **NOT** an acceptable substitute for your chapter material.

### **Capitalization**

The general rule is to capitalize as little as possible.

The word "court" is not capitalized unless the full name of the court is used. The words "act," "chapter," "section," etc., are capitalized only when part of a full, proper name. "Federal" is not capitalized in reference to the United States government.

## **Figures**

Numbers from one to nine should be spelled out. Numbers over 10 appear as figures. In general text, avoid redundant expressions of figures such as “a total of ninety (90) days,” and use “a total of 90 days.”

In a discussion involving sums of money, if all sums are expressed in round figures, omit the decimal and the two subsequent zeros.

## **Word Processing Guidelines**

- A. Margins – 1 inch top, bottom, and sides of each page (including first page of text).
- B. Font – “Times” or “Times New Roman” 12 points, or the equivalent, is preferred.
- C. Pagination – Center the page numbers ½ inch from the bottom of the page, or handwrite them in pencil on the reverse side of each page.
- D. Spacing – Manuscripts should be single-spaced. Double-space between paragraphs. Do not indent the first lines of paragraphs.
- E. Paper – Please use 8½ by 11 inch ordinary weight, non-glossy, white paper.

## **Uniformity of Structure: Extended Outline Format**

All chapters should be in extended outline format. “Extended outline” simply means using headings to establish a road map to the contents of your text. This format is easy to follow, and PBI will use it to develop a detailed table of contents. Use the following guidelines when possible:

# Sample Outline Format

- I. "ROMAN NUMERAL"—FOR MAJOR SUBDIVISIONS—THIS STYLE STARTS AT LEFT MARGIN, ALL CAPITAL LETTERS, NO UNDERLINES

"Roman level text" starts at the left margin, with no first line indent, and double spacing between paragraphs.

- A. "A. level"—The Next Subdivision—First Letter of Nouns and Verbs Capitalized in this Heading—Heading Should be Phrases, not Sentences

"A. level text" starts at the indent aligning with the A. heading above, with no first line indent, and double spacing between paragraphs.

- 1. "1. level"—Only the first letter of the first word is capitalized at this level, if it is a heading

"1. level text" starts at the indent aligning with the 1. heading above, with no first line indent, and double spacing between paragraphs.

- a. "a. level"—text from this level down retains the hanging indent, with all text aligning at the tab instead of at the "a."

(1). "(1) level"

(a). "(a) level"

(i). "(i) level"

Although you are using outline format, your text should use complete sentences and paragraphs.

## **CITATIONS**

### **Arrangement**

The Pennsylvania Constitution and statutes, Pennsylvania Supreme Court, Superior, or Commonwealth Court, trial court decisions, and opinions from other courts should generally be cited in that order. There will, however, be occasions when United States statutes and decisions will properly be cited first. When two or more decisions decided by the same court are cited, they are placed in *reverse* chronological order so that the later case is cited first, unless there is some reason for not doing so. Cases fully cited in sequence are separated by semicolons.

### **General Rules**

Case *names* are *italicized*, with “versus” abbreviated as “v.” The date in parentheses is placed after the volume and page citation. Signals, such as *cf*, *compare*, *but see*, *accord*, and *contra*, the references *supra* and *infra*, and case history, such as a *cert. denied* and *allocated denied*, are *italicized*. (Do not use underlining.)

References to particular pages in the first reference to a case simply follow the reference to the first page, separated by a comma, without using “p” or “at.” This is also done with respect to all reports used in citing the case—for example, *Commonwealth ex rel. O’Lock v. Rundle*, 415 Pa. 515, 525–7, 204 A.2d 439, 444–5 (1964). In a *supra* or *infra* reference, references to particular pages are preceded by “at,” for example, *O’Lock, supra*, at 527, 204 A.2d at 445, the reference to the volume of the official report not being repeated.

If one or more cases appear twice within a section of not over two pages, the second reference should read: *Jones v. Jones, supra*, or *Jones v. Jones and Smith v. Smith, both supra*, or *Jones v. Jones, Smith v. Smith, and Allen v. Allen, all supra*. In criminal cases, only the accused's name need be used in the second reference—for example, in referring to three previously cited cases, *Kutter, Slascher, and Kneifer, all supra*.

## **CITATION FORMATS**

### **Pennsylvania Cases**

#### **Pennsylvania Supreme Court**

Published: *Ice City, Inc. v. Insurance Co. of North America*, 314 A.2d 236 (Pa. 1974)

Slip Op.: *Commonwealth v. Williams*, \_\_\_ A.2d \_\_\_, No. 211 Capital Appeal Docket (Pa. October 19, 2001)

#### **Pennsylvania Superior Court**

Published: *Commonwealth v. Burton*, 770 A.2d 771 (Pa.Super. 2001)

Slip Op.: *Commonwealth v. Days*, \_\_\_ A.2d \_\_\_, No. 969 WDA 2000 (Pa.Super. October 16, 2001)

#### **Pennsylvania Commonwealth Court**

Published: *Mellon v. City of Pittsburgh Zoo*, 760 A.2d 921 (Pa.Cmwlt. 2000)

Slip Op.: *J.R. Magee, Inc. v. Pennsylvania Liquor Control Board*, \_\_\_ A.2d \_\_\_, No. 318 C.D. 2001 (Pa.Cmwlt. September 18, 2001)

**Pennsylvania Courts of Common Pleas**

Published: *Reigert v. Giant Food Stores, Inc.*,  
37 Pa.D.&C.4th 515 (C.P. Lebanon  
1997)

OR

*Commonwealth v. Myers*, 40  
Dauph. 215 (1935)

Slip Op.: *Parsky v. First Union Corp.*, No.  
771 (C.P. Philadelphia August 17,  
2001)

**Pennsylvania Environmental Hearing Board**

Published: *Fisher v. DER*, 1993 EHB 425

Slip Op.: *Zook v. DEP*, EHB No. 2000-153-R  
(July 10, 2001)

**Pennsylvania Statutes**

**Pennsylvania Consolidated Statutes**

17 Pa.C.S. § 503

**Purdon's Pennsylvania Consolidated Statutes  
Annotated**

23 Pa.C.S.A. § 2531

**Purdon's Pennsylvania Statutes Annotated**

31 P.S. § 417-3

**Pennsylvania Rules**

**Pennsylvania Rules of Civil Procedure**

Pa.R.C.P. 2205

**Pennsylvania Rules of Criminal Procedure**

Pa.R.Crim.P. 414

Pennsylvania Rules of Evidence  
Pa.R.E. 604

**Pennsylvania Rules of Appellate Procedure**  
Pa.R.A.P. 313

**Pennsylvania Orphans' Court Rules**  
Pa.O.C.Rule 15.5

**Pennsylvania Rules of Judicial Administration**  
Pa.R.J.A. 1903

**Pennsylvania Rules of Disciplinary Enforcement**  
Pa.R.D.E. 104

**Pennsylvania Rules of Professional Conduct**  
Pa.R.P.C. 1.4

**Court of Judicial Discipline Rules of Procedure**  
C.J.D.R.P. 112

**Philadelphia Rules of Civil Procedure**  
Phila.R.Civ.P. 430.2

**Philadelphia Municipal Court Rules of Civil  
Practice**  
Phila.M.C.R.Civ.P. 438

**Allegheny County Local Rules**  
Alleg.Co.L.R. 225

**Dauphin County Local Rules**  
Dauphin Co.L.R. 1905

## **Other Pennsylvania Citations**

### **Pennsylvania Bulletin**

31 Pa.B. 4052 (July 28, 2001)

### **Pennsylvania Code**

58 Pa.Code § 147.1111 (for sections)

58 Pa.Code ch. 147 (for chapters)

### **Pennsylvania Bar Association Quarterly**

71 Pa. Bar Ass'n Q. 172 (April 2000)

## **U.S. Cases**

### **U.S. Supreme Court**

Published: *Campbell v. Acuff-Rose Music*, 510

U.S. 569 (1994)

OR, if no U.S. cite,

*Tyler v. Cain*, 121 S.Ct. 2478

(2001)

OR, if no S.Ct. cite,

*Brown v. Gilmore*, 150 L.Ed.2d 782

(2001)

Slip Op.: *Immigration & Naturalization*

*Service v. St. Cyr*, \_\_\_ U.S. \_\_\_,

No. 00-767

(June 25, 2001)

### **U.S. Courts of Appeals**

Published: *Rose Art Industries, Inc. v.*

*Swanson*, 235 F.3d 165 (3d Cir.

2000)

Slip Op.: *United States v. Vazquez*, \_\_\_ F.2d

\_\_\_, No. 99-3845 (3d Cir. October

9, 2001)

**U.S. District Courts**

Published: *Hershey Foods Corp. v. Mars, Inc.*,  
998 F.Supp. 500 (M.D. Pa. 1998)

Slip Op.: *Warren v. Pizza Hut*, \_\_\_ F.Supp.  
\_\_\_, Civil Action No. 97-6169 (E.D.  
Pa. July 24, 1998)

**U.S. Bankruptcy Court**

Published: *In re Bedford Square Associates,*  
*L.P.*, 247 B.R. 140 (Bankr. E.D. Pa.  
2000)

Slip Op.: *In re Townsville*, \_\_\_ B.R. \_\_\_,  
Chapter 13, Bankr. No. 00-  
19680DWS (Bankr. E.D. Pa.  
October 3, 2001)

**U.S. Tax Court**

Published: *American Air Filter Co. v.*  
*Commissioner of Internal Revenue*,  
81 T.C. 709 (1983)

Slip Op.: *Estate of Reichardt v.*  
*Commissioner of Internal Revenue*,  
\_\_\_ T.C. \_\_\_, Dkt. No. 1224-98  
(March 1, 2000)

**U.S. Court of Federal Claims**

Published: *Laguna Gatuna, Inc. v. United*  
*States*, 50 Fed.Cl. 336 (2001)

Slip Op.: *Griffy's Landscape Maint. LLC v.*  
*United States*,  
\_\_\_ Fed.Cl. \_\_\_, Case No. 01-  
309C (August 17, 2001)

**Federal Energy Regulatory Commission**

Published: *In re El Paso Energy Corp.*, 93  
FERC 62, 228 (2000)

**Federal Statutes**

**Acts**

Tax Reform Act of 1986, Pub. L. No. 99-514,  
100 Stat. 2548 (1998)

**United States Code**

16 U.S.C. § 410

**United States Code Annotated**

17 U.S.C.A. § 106

**United States Code Service**

24 U.S.C.S. § 422

**United States Code Unannotated**

21 U.S.C.U. § 378

**Federal Rules**

**Federal Rules of Civil Procedure**

Fed.R.Civ.P. 44

**Federal Rules of Criminal Procedure**

Fed.R.Crim.P. 12

**Federal Rules of Appellate Procedure**

Fed.R.App.P. 3

**Circuit Court Rules**

3d Cir. R. 28

**Federal Rules of Evidence**

F.R.E. 805

**Federal Rules Decisions**

106 F.R.D. 446 (E.D. Pa. 1985)

**Uniform Rules of Evidence**

Unif.R.Evid. 401

**Supreme Court Rules**

Sup.Ct.R. 15

**Other Federal Citations**

**Code of Federal Regulations**

21 C.F.R. § 291.501 (2000)

45 C.F.R. part 61

**Federal Register**

66 Fed.Reg. 4076 (2001)

**Internal Revenue Code**

I.R.C. § 104 (1996)

**Internal Revenue Rulings**

Rev. Rul. 90-16, 1990-1 C.B. 12

**Treasury Regulations**

Treas.Reg. § 101 (1999)

**Other**

All other citations, including secondary materials, should be as set forth in the current edition of *The Bluebook: A Uniform System of Citation*, published by the Harvard Law Review Association, Gannet House, Cambridge, Massachusetts 02138. Even if the correct style cannot be determined, complete data (such as author, title, page number, and year) should be given to enable the reader to locate the material. The year of publication should be given on all secondary material.

# Effective PowerPoint Tips

*Important Note: A PowerPoint presentation enhances but is not a substitute for well-written materials.*

- Prepare your PowerPoint presentation in outline format. (Our system does not accommodate Mac presentations.)
- Acceptable format:
  - Bullet points
  - Graphs
  - Charts
  - Case citations
  - Header font size (44 points)
  - Text font size (32 points)
- Unacceptable format:
  - Paragraphs of text
  - Forms
  - Brochures
  - Font sizes less than 32 points
  - Margins less than 1 inch
- Use the “floor test” to ensure slides can be read from the back of the room.
- E-mail your PowerPoint presentation to us one week before the program to be reproduced as a handout.
- Be familiar with PowerPoint software and using a laptop before the program.
- Bring a backup CD, disc, or thumb drive to the program.
- Do not read your slides to the audience.

# Successful Presentation Tips

## **Prepare, Prepare, Prepare**

- Know your audience
- Rehearse
- Cut your lecture notes in half—take only a basic talking points outline to the podium
- Speak conversationally—never read your notes
- Make every effort to stay on topic
- Involve your audience—ask questions, walk around the room, encourage discussion
- Consider the time of day in which you are scheduled to speak—late afternoon presenters will do better by keeping information concise and to the point

## **Be Gender Neutral**

- Refrain from making sexist jokes
- Don't assume that "male" also includes "female"—be conscious of male-biased language
- Use neutral terms as much as possible
- For ideas on gender neutral language, refer to a handbook:

*The Handbook of Nonsexist Writing,  
2<sup>nd</sup> Edition, Casey Miller & Kate Swift, Harper &  
Row, 1988*

*The Nonsexist Word Finder: A Dictionary of  
Gender-Free Usage, Rosalie Maggio, Beacon  
Press, 1988*

### **Give the Audience What They Want**

- Provide practical tips
- Use personal anecdotes and real life examples that relate to your topic
- Use visual aids—PowerPoint presentations, slides, sample forms, demonstrations
- Sum up key points
- Refer the audience to written materials on minor points
- Give the audience specific page numbers as to where the material can be found in the course book
- Repeat audience comments or questions
- Use body language
- Refrain from telling jokes and never apologize
- PowerPoint presentations enhance your presentation—they are not a substitute for written materials