dri™

Declaration of Candidacy

Position sought:

☐ Second Vice President*   ☐ Secretary-Treasurer   ☑ National Director

Name   Freddie Exzell (Trey) Bourn III

Firm/Company   Bradley Arant Boult Cummings LLP

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E-mail   tbourn@bradley.com

How long have you been a member of DRI?   ___25___   years

Areas of practice: Product Liability, Commercial, Energy, General Litigation

Please provide your employment history in chronological order beginning with the current position.

- Bradley Arant LLP, February 2025 to present

- Butler Snow LLP, May 2001-February 2025

- Mitchell McNutt & Sams, September 2000-May 2001

- Commercial Dispatch, Sportswriter, Columbus, Mississippi, October 1994-August 1996

Please describe your previous involvement in DRI, including but not limited to, leadership positions held, projects contributed to, committee memberships, presentations given, and written materials authored. Special accomplishments should also be noted.

- Chair of Product Liability Committee, 2023-25 (Vice Chair 2021-23)

- Program Chair of 2019 Product Liability Conference

- Member of Products Liability Steering Committee since 2010, roles:
  - Chair and Vice-Chair of Recreational Products SLG
  - Panel Counsel Chair and Vice-Chair

- o Membership Engagement Chair
- o Networking Chair and Vice-Chair

- Author, "My Gut Says, "Yes," but Is That Correct?" <u>For The Defense</u>, October 2023.

- Author, "Why Expansion of Commerce and Trade Does Not Expand the Reach of the Courts: In Personam Jurisdiction and Stream-of-Commerce Theory," <u>For The Defense</u>, November 2011

- Speaker, "Making Life Easier for the Recreational Products Client in the `New Economy,'" 2010 DRI Products Liability Seminar, Recreational Products Specialized Litigation Group, Las Vegas, Nevada

- Speaker, "Hold on to Your Hats: The Year in Review," 2008 DRI Products Liability Seminar, Recreational Products Specialized Litigation Group, Phoenix, Arizona

- Author, "After the Recall: What Do We Do Now?" <u>DRI In-House Defense Quarterly</u>, Fall 2007

List any significant leadership commitment and involvement within the legal field other than DRI, including but not limited to other legal organizations.

- International Association of Defense Counsel (IADC)

- Listed in The Best Lawyers in America
  - o Commercial Litigation, 2017-25
  - o Product Liability – Defendants, 2022-25

- Martindale-Hubbell® AV Preeminent Rated

- Listed in Mid-South Super Lawyers
  - o Personal Injury – Products: Defense, 2013-2024
  - o Rising Stars, Personal Injury – Products: Defense, 2009-10

- 2017 Yancey Memorial Award for outstanding article in the <u>IADC Defense Counsel Journal</u>

- Martindale-Hubbell®, Top Rated Lawyer in Insurance Law, 2013

- Listed in <u>Mississippi Business Journal</u>, Top 40 Under 40

- Leadership Jackson, Class of 2003-04

- J.B. Carr Community Service Award

- President of Jackson Young Lawyers

Why do you wish to join the board of directors or become an officer and what skills, abilities and attributes identified in the Board of Director/Officer Competencies can you bring to the role?

See Appendix, pp. 6-9.

What suggestions would you make to move the organization forward?

Generally, I believe DRI cannot forget what makes it a great organization: It is a membership-led organization built on collaboration and inclusion. It has to understand that what works for one committee, might not work for all committees. Thus, it is vital for DRI to listen to all its members in different committees, try to understand what makes those committees unique, what makes them work, and what they need to grow -- and then work with the individual committees to meet those needs as efficiently as possible. In other words, even though I love protocols and checklists, DRI cannot forsake its inclusive and collaborative nature for the sake of predictability, as tempting as trying to fit a "square peg into a round hole" might initially appear.

Specifically, here are some suggestions I believe that are in line with the above:

- Continuing the "Tool Box initiative" to give committees the basics, so they do not have to reinvent the wheel every couple of years, instead concentrating on initiatives unique to each committee.
- Having more efficient communications between the DRI staff, Law Institute, and the Board, so individual committees will clearly know their substantive goals and objectives they have to meet.
- Providing more opportunities to host online webinars, publish articles, and other educational opportunities, so members, especially younger lawyers, may increase their exposure and add to their bios.
- Better marketing of the various databases already provided by DRI (e.g., expert database, etc.).
- Having the new smartphone app (which I have not seen yet) as the primary way to access DRI information, including seminar info, membership contact info, and educational materials, as well as register for seminars.

Describe one transformational/defining experience in your professional life you have been involved with and what you learned from that experience.

See Appendix, pp. 10-13.

Describe the greatest challenges and opportunities that lie ahead for DRI over the next five+ years.

I believe the greatest threat to DRI is less interest from younger attorneys to develop business through networking at conferences such as DRI's. I believe this has not been

helped by law firms' tightening their belts, especially after Covid, which saw individual lawyer revenues increase by cutting expenses. I am not sure, though, what the solution is other than to continue to work as hard as possible to have younger lawyers involved in committees outside the YL Committee as soon as possible. As mentioned above, providing opportunities to speak, publish, as well as offering facetime with clients they might not otherwise have, in my experience, does seem to resonate with younger lawyers and encourage them to become and stay involved in DRI.

The biggest opportunities DRI have revolve around the nature of the organization. As stated above, DRI is, by its nature, inclusive and collaborative. As a result, if a lawyer wants to get involved, he or she can get involved if he or she does the work. Lawyers will also rise through the ranks if they do a good job, which will provide them more networking and client development opportunities than any other organization I know.

DRI strives to be governed by a diverse board of directors—in terms of race, ethnicity, age, gender, religion, sexual orientation, disability, location, and/or professional level, and other facts that enhance diversity and inclusion --- who can and will help advance DRI's goals through the power of collaboration. In what ways have you demonstrated a commitment to Diversity, Equity and Inclusion in your work, and how will your DE&I experience inform your contributions as a Board member?

As detailed in my response to the "Why" question, I made my first goal as Chair to increase membership diversity by consistently reaching out to the DE&I and WITL Committees. In order to do so, I:

- Formed a Membership Action Committee ("MAC") from the current four products membership positions (Membership, Membership Engagement, Welcoming, and Ambassador).

- Invited the DE&I and WITL Committee Liaisons to be members of the MAC and actively participate in all the MAC Meetings.

- Sent targeted emails to the DE&I and WITL Committees before the Products Conferences, informing members on how to get involved in the Products Steering Committee, as well as encouraging them to attend the conferences.

- In filling new leadership positions in 2024 and 2025, made sure to prioritize those who expressed an interest as a result of these e-mails.

- Had first DE&I and WITL luncheon at February's Products Conference in a few years with an excellent speaker.

- Instituted a "Membership Protocol," see Appendix at pp. 14-16, which became part of the Product Liability Playbook (attached), specifically ensuring future steering committees make it a priority to inform members of the DE&I and WITL committees on how to get involved on the Products Steering Committee and providing a path to do so.

Is there anything else you would like to add that has not already been previously stated?

To echo my response to the above "Why" question, I am incredibly grateful to DRI. It has completely transformed my legal career, providing me opportunities I never would have had without it. Likewise, personally, I have met some of the best people I have ever known, giving me some of my best friends with whom I have shared laughter and joy consistently at DRI events, but from whom I have also received comfort in my darkest times. The opportunity to run for Director is solely due to them. It is because of them I want to do all I can to provide future generations the same opportunities, allowing them to be able to build the type of law practices they actually want.

APPENDIX

Why do you wish to join the board of directors or become an officer and what skills, abilities and attributes identified in the Board of Director/Officer Competencies can you bring to the role?

Candidly, until recently I was not sure I actually wanted to run for the Board of Directors. The past year (the second year of my term as Chair of the Products Committee) was hard for a variety of reasons, but in the end was incredibly fulfilling mostly because of the success of the February 2025 Products Conference and the work that went into it. In retrospect, I do believe that my leadership style contributed to its success in addition to the many important individual contributions of others. I also believe my style is reflected in the Board Competencies of Collaboration, Team Orientation, Conflict Management, Accountability, and Emotional Intelligence. After much introspection, and seeking trusted and wise counsel, I ultimately decided that I do in fact have more to contribute to DRI and want to continue to play a part in its future success.

Specifically, because I have been fortunate enough to serve in several leadership positions in my professional life, I have learned a leadership style that works best for me, and, even though it probably takes more effort, seems to resonate with people, as it does on the Products Committee. This style is closely aligned with what others have termed as a "servanthood" style of leadership.

In other words, by putting people in positions for which I believe they are most qualified, and encouraging them to move forward with their own vision and style, I can concentrate on the end goal, picking up the slack where needed, and doing the necessary behind-the-scenes work, which includes taking care of details hard to see by those in narrowly focused roles, as well as putting out fires before they get out of control. This allows those "on the frontlines" to concentrate solely on their jobs without worrying about something unforeseen derailing their vision and progress. I believe such a style can also be summarized in a quote I actually heard at my first DRI Leadership Conference: Be a leader whose priority is "getting it right," not "being right."

This style necessarily takes more effort than just barking orders or doing everything alone, and it takes earning the trust of others to "buy in" to the process. Earning that trust can only happen through open and honest communications and taking responsibility for mistakes with honesty, immediacy, and integrity.

One necessary component of "buying in" is for members to be willing to collaborate with each other, which I believe is key to the success and health of any organization, especially DRI. In order to collaborate, members have to be willing to be vulnerable in sharing their ideas, without fear of making a mistake or looking stupid. The best leaders I have known were able to encourage such vulnerability by conveying the message that every idea, even those that do not make the final cut, have value. As Program Chair,

and later Committee Chair, I encouraged this message by emphasizing how important it is to have courage in order to engage in the open dialogue necessary to plan a conference. In such situations, courage is easy if one trusts the process, believing his or her idea might spark another idea in someone else's head, which might lead to a spark in someone else's, and so on. While this process can be messy and frustrating, I have found that, more times than not, it leads to an amazing final product -- much better than what only one person can accomplish by himself or herself -- and one in which everyone involved can be proud and see their hands in the final product.

Because it can be so messy and time consuming, such collaboration also takes patience, vigilant time management, and a willingness to work as hard as possible to account for every possible detail. This includes resolving any unforeseen obstacles or personality conflicts as quickly as possible, which must be done with humility, honesty, and integrity.

I also believe a by-product of such a servant style of leadership, which by its nature necessitates trust, is that it leads to true innovation because members feel free to share so many of their ideas. However, it is my job then to identify and align any such ideas with those that meet the goals of the committee and the larger organization, which I believe occurred during my tenure in the following three instances.

Increasing Membership Numbers and Diversity (the MAC)

One of the first goals I emphasized as Chair was to increase membership not only in numbers, but also in diversity by consistently reaching out to DE&I, WITL, and YL Committees, as well as previous committee members, new members, and Conference First-Time Attendees.

In order to do so, one of the first things I did was form a Membership Action Committee ("MAC") from the four committee membership positions (Membership, Membership Engagement, Welcoming, and Ambassador) as well as liaisons for the DE&I, WITL, and YL committees.

Starting in November 2023, the committee met monthly, and the ideas discussed in these meetings led to the MAC writing several protocols for the four membership positions (Membership, Membership Engagement, Welcoming, and Ambassador) to ensure that any member, new or otherwise, who wants to get involved on the Steering Committee, will know how to do so. The Welcoming and Ambassador Committees under Rob Shields and Adam Shienvold, specifically instituted protocols used at the 2024 and 2025 Products Conferences to identify potential leaders and to recommend them, with the MAC's help, to open leadership positions. The above protocols were made to ensure a more diverse group of leaders each year, not merely recycling the same people in different positions, and laying out a path for them to become more involved in the future. The MAC, after discussing the above in more detail, took the above protocols and instituted a "Membership Protocol" for the Products Liability Steering Committee, which was incorporated into the completed "Products Liability

Playbook." See Appendix at pp. 14-16. This protocol not only worked to meet the goal of increasing membership and diversity, but I believe will also continue to ensure the same in future generations.

Continuity (Playbook)

One of the biggest needs when I became Chair was continuity. As a result of Covid, and the subsequent reduction in membership, there was a loss of corporate knowledge in what the leadership inherently knew or had passed down over the years. The previous Chair, Gretchen Miller, understood this and had begun working on descriptions for the committee's leadership positions. Vice-Chair Lindsay Lorimer and I, in our initial meeting, decided to incorporate and finish these descriptions, as well as add other information we considered relevant to provide guidance for future committees. This became our "DRI Products Liability Playbook," which is attached. The Playbook includes descriptions for each committee leadership position, including responsibilities and timelines for Specialized Litigation Groups' Chairs and Vice-Chairs. It also includes advice, templates, and protocols from current members to guide future leaders.

This project ended up taking more time and work than originally anticipated, but was completed and distributed in April 2024 at the Products Liability Steering Committee's Fly-In. The Playbook was very well received and was recognized at the May 2024 SLC Chair and Vice-Chair Meeting. The Playbook is a working document and continues to be updated with committee members' revisions, tips, and ideas to meet the goal of preserving the committee's "corporate knowledge" for future steering committees.

Increasing Conference Registration Numbers, Client Involvement (Off-Site Interactive Program)

Lastly, another goal was to increase registration numbers at the Products Conference, which we did in 2025, meeting the conference's goals for the first time in quite a while. I have long believed that the way to increase registration numbers is to have more clients attend and be involved in the conference itself. In addition to an increased attention to, and increased marketing for, DRI's Panel Counsel program, for the first time we had an "off-site interactive program," led by clients who gave real-time inspection scene advice with their products at different stations.

I cannot take credit for the inception of this idea (Vice-Chair Lindsay Lorimer and SEA's Ryan Grantham originated the idea based on the Products Committee's Fire, Science, & Litigation Conference's "Live Burn") or for the planning of the event (ESi's Heather Stanton, DRI's Laurie Miller, Mohamed Bakry -- in addition to Lorimer and Grantham -- did the hard work to make it all happen). All I did was identify that it was a great idea, encourage them to put it into action, and, then, by "walking besides them," did a lot of behind-the-scenes work, putting out fires, and managing conflicts in order to let them "do their thing." The end result was amazing and laid the groundwork for more such events in the future.

Although these examples were not originally my ideas, I do believe they succeeded because of the collaborative environment built on the trust I hope I have created throughout my tenure as Chair.

While the above describes why I believe I can continue to contribute to DRI's success by being a Director, I cannot end my "why" without expressing my deep gratitude for the many DRI leaders, friends, and colleagues who have believed in me throughout my DRI life. It is **only** because of them that I am even in a position to run. Their belief in me has shaped not only my DRI trajectory, but my outside professional and personal life, opening up opportunities I never would have had otherwise and forcing me -- at times kicking and screaming -- to believe in myself as well. The reason I have finally decided to run is not only to live up to their belief in me, but pass on the faith, guidance, and support they gave to me to future DRI generations and leaders.

Describe one transformational/defining experience in your professional life you have been involved with and what you learned from that experience.

This is a long story.

I understand, then, why the reader might skip to the end, where I do discuss my "lessons learned." However, because the below impacted me so deeply, I believe it is necessary to give some context and more detail. For an abbreviated version of the events, though, see the pages dedicated to it in the history of the Mississippi Law Journal.[1]

When I was a 2L at the University of Mississippi School of Law, I was one of five candidates for Editor-in-Chief of the Mississippi Law Journal. It was a grueling process over two months in spring 1999, which included multiple interviews, speeches, projects, etc. After an election by the Journal membership and a subsequent run off, I was chosen to be Editor.

I had little time to enjoy the victory, though. Without my, or any of the membership's, knowledge, the Law School faculty had been meeting throughout the semester to discuss taking control of the Law Journal, based on a theory that the Journal's two governing corporations were defunct.

Since 1978 the Journal had been governed by two corporations: one alumni governed and the other student governed.[2] Research revealed the faculty was correct: Both corporations during the mid-80s became defunct due to inactivity, which resulted in the Journal being operated for many years with no connection to its alumni. Furthermore, because the Journal was independent from the University, receiving no financial assistance from it, this meant the Journal was operating year-to-year with no oversight.[3]

One main discussion during these faculty meetings was their disapproval of the Journal's membership process, which at the time, was to invite every law student with a certain minimum GPA to compete in a case note competition, graded by the current members of the Journal, the results of which determined membership (a "write-on"). This had been the Journal's method of selecting its members since 1956 and was enormously popular with the Journal's alumni.

On the day after my election, in a memo to the previous Journal leadership and myself, the faculty relayed that it had passed a resolution recommending the Journal change its

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[1] Spencer M. Ritchie, The Journal's Journey: A History of The Mississippi Law Journal, 81 Miss. L. J. 1527, 1555-57 (2012).

[2] Id. at 1557.

[3] See id. at 1550-54, 1557 for a history of the two governing corporations and the reasoning behind the Journal's independence from the University.

membership selection to a "grade-on" process, automatically making students with the highest GPAs members without participating in a case note competition.[4] The memo further stated that if the Journal did not change its process, the faculty would be forced to take action. Through private conversations with trusted faculty members, I discovered this meant some sort of legal action to become the governing body of the Law Journal.

Furthermore, because the alumni-governed corporation was defunct, it was solely up to the Journal's current student membership to agree or not with the faculty's proposal. In other words, we could not rely on the Journal's alumni to shield us from the faculty. It was us (me) against the faculty. During exams.

When I realized there was no way to avoid the issue or postpone it until the fall semester, I decided to take action instead of risking the faculty's attempting some sort of hostile takeover that summer when most of the membership would be clerking with out-of-town law firms.

In the one month left of the semester, I determined, after two contentious meetings with the faculty and several meetings with my newly appointed editorial board, that

1. From the faculty's perspective, there needed to be a fairer membership selection process. This included an objective standard, as opposed to the subjective nature of a case note competition (where one also, arguably, could determine whose paper he or she was grading, even though the process was "blind"). The faculty believed a student's GPA was the best "objective" standard for such a process, even though one professor, who became frustrated with me during one of the faculty meetings, slipped and said he was more qualified to choose members than I could ever be.

2. From the students' perspective, there had to be a writing component as part of the process to ensure new members learned how Journal articles should be edited, including using the Bluebook format, which was a necessary component of being a Journal member.

    It was also important to members that the process be inclusionary, not exclusionary. In other words, it should not exclude students who would have gotten on the Journal through the current case note competition.

As a result of these conversations, I made a proposal to address what I considered the legitimate concerns of both groups. Specifically, to meet the faculty's concerns:

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[4] The faculty proposed the following: "(1) the top-10 percent of each second-year class automatically receive an invitation to join the Journal without participating in any competition or writing a case note; (2) the minimum GPA for students participating in the case note competition be raised; and (3) the total number of students on the Journal be capped at 50." Id. at 1555-56.

1. Institute a double-blind grading process for the case note competition, ensuring no Journal member could determine whose paper he or she was grading, so the competition would be as fair as possible, and

2. Invite law students with the top-15 GPAs to become members of the Journal without participating in the case note competition. However, they still had to write an "acceptable" case note to become a member.

To meet the students' concerns:

1. The case note competition would remain, and, even though they would not participate in the actual competition, the top-15 students still had to complete a writing requirement to become a member.

2. The minimum GPA to participate in the competition would remain the same (the faculty wanted to raise it).

3. There would be no cap on how many students could become members (the faculty wanted a cap, which, in essence, would limit the membership mostly to the top 10 percent of students because only a few slots would remain for students to become members through the competition).

After some debate, the proposal[5] was accepted by both groups mainly because the faculty got a say in how students were selected and the students saw the process as inclusionary, not exclusionary.

The following months were still not easy, though.

It got out to alumni that I somehow singlehandedly killed the beloved "write-on" process for an evil "grade-on" one. I received several angry calls from alumni, including those at the law firms at which I was clerking that summer. This culminated in a sold-out Law Journal alumni breakfast (held annually) at the Mississippi Bar Convention that summer. Luckily, the anger quickly subsided when I relayed the events as honestly as I could and explained the logic behind the decisions. This included relaying what I considered the faculty's real motivation -- becoming the governing body of the Journal -- much to the chagrin of the law school's Dean and his wife, who were both in attendance.

So what did I learn from this experience? Well... everything:

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[5] The Journal's proposal included "(1) the top fifteen students of each second-year class would automatically be offered membership on the Journal; (2) those fifteen students would still be required to write a case note; (3) all second-year students with a GPA of 2.8 or above would be invited to participate in a case note competition; and (4) there would be no limit on the number of Journal members." Id. at 1556.

- First, listen. Really listen.

- Rise above my ego and defensiveness, and all other sorts of rancor, to try and understand what people really want (even if they have trouble articulating it).

- In addition to rising above my own ego, determine and discount accordingly others' ego-based proclamations and/or threats.

- Determine a best solution or course of action to get as close as I can with integrity to what is best for everyone involved.

- Have the courage to move forward and not get derailed by those who only want to criticize or take credit with little-to-no effort on their parts.

- Understand that it will feel very lonely at times when trying to do the right thing, but remind myself it will be worth it, **IF** I remain true to the plan, its purpose (not my ego), and not take shortcuts.

- That said, not be scared "to call an audible," if I see an opportunity unforeseen when formulating the plan.

- In the process, choose to be around those I trust and can collaborate with freely without their becoming upset if I disagree or choose a different course of action, but not be scared to challenge me if they also disagree with me.

- Work as hard as I can to implement the plans as quickly and efficiently as possible. The world is full of people who have great ideas, but lack the courage, humility, and work ethic to implement them.

Lastly, I learned when making hard decisions not only to consider how such decisions might impact future generations, but go a step further and lay a foundation for their future successes. Along those lines, and as a postscript to the above, while the faculty were busy debating the membership selection process, I began meeting with an outside corporate lawyer to determine how to prevent such actions from happening again.

As a result, unbeknownst to the faculty, a year later the Journal merged the two defunct corporations into one active corporation, which had a Board of Directors with an alumni majority.[6] No students would ever have to battle the faculty by themselves again. To date that corporation is active, and there have been no attempts to take control of the Law Journal.

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[6] See Id. at 1557 ("The Journal decided in April of 2000 to … create a single board of directors for the Journal. This board of directors, which continues to meet annually, is comprised of four Journal alumni, three student editors from the Journal, and one faculty advisor. The board has the authority to conduct all the business of the Journal, including the election of future directors.").

![dri](dri logo)

Membership Protocol for DRI Products Liability Committee

The below membership protocols are meant to ensure future committees will not have to start from scratch to implement and follow proven methods of adding new members and retaining current members, to ensure that all members are engaged and active in the Products Committee. This membership plan should constantly be refined and updated as strategies are determined to be effective.

1. Each year, the Committee Chair should form a Membership Action Committee (MAC) comprised of the following:
   a. Committee Chair and Vice-Chair
   b. Membership Chair and Vice-Chair
   c. Membership Engagement and Ambassador Team (MEAT)
      i. Welcoming and Engagement Chair
      ii. Ambassador Chair
   d. Diversity, Equity, & Inclusion Liaison
   e. WITL Liaison
   f. Young Lawyer Liaison
   g. DRI Membership Liaison

2. The goal of the MAC is to
   a. Identify DRI members not currently involved on the Products Steering Committee.
   b. Contact these members and invite them to attend monthly steering committee meetings.
   c. Inform these members on how to get involved on the steering committee:
      i. SLG positions
      ii. Other areas of interest (e.g., publications, etc.)
      iii. Make sure these members are put in touch with the chairs of these SLGs or committees and follow up afterwards.
   d. A special emphasis is to be made to identify and contact members on the D&I, WITL, and YL Committees.
      i. E-mail from the Committee Chair before the Products Conference promoting attendance and explaining the "flow" of the conference and key meeting events.
      ii. Committee Chair to work with the above liaisons for these committees to identify things specific to each committee that the Steering Committee must do to attract members and involvement.
      iii. In contacting and identifying members on the D&I, WITL, and YL Committees for leadership, attempt to gauge if there are budgetary concerns (or the perception that one will not be able to participate because of budgetary concerns). If there are:
         1. Market and suggest DRI's Enterprise Membership Program, emphasizing its incentives.
         2. Be mindful that affinity group seminars and organizations (e.g.., NAPABA) can affect one's budget and perhaps even prevent one from being active in or joining the Steering Committee, or even participating in the Products Liability Committee's substantive events.
         3. If it is determined that the individual's law firm does not participate in the Enterprise Program, encourage the individual to ask his or her firm to participate, by sending information on the Program and its benefits (https://www.dri.org/docs/default-source/webdocs/other/enterprise-membership.pdf), which might allow the individual the budgetary funds needed to participate.

e. A special emphasis is also to be made to reach out to members who were previously active and may have "fallen through the cracks."

3. The Membership Chair and Vice Chair will schedule and host monthly MAC Meetings, but schedule weekly MAC meetings two months out from the annual Products Liability Conference.

4. The Membership Engagement and Ambassador Team (MEAT) will make sure each new attendee for the annual Products Liability Conference is identified, contacted, and assigned an "ambassador" for each Conference. In order to do so, the below protocol should be followed:
   a. When Committee Chair, Committee Vice-Chair, Membership Chair, and/or Membership Vice Chair receive a list of New Members, they will send list to the MEAT. The MEAT will send a welcome e-mail to New Members,
      i. Discussing the next Products Liability Conference,
      ii. Encouraging New Members to attend, and
      iii. Informing New Members of the Ambassador Program.

   b. No less than 30 days prior to the annual Products Liability Conference, the Committee Chair and/or Vice-Chair requests and receives a list of the Conference's First-Time Attendees and, in turn, sends this list to the MEAT.

   c. The MEAT assigns Ambassadors to ALL First-Time Attendees of the Products Liability Conference and sends an e-mail to First-Time Attendees,

      i. Discussing the upcoming Products Liability Conference,
      ii. Informing First-Time Attendees of the Ambassador Program, and
      iii. Introducing each First-Time Attendee to his or her Ambassador.

   d. The MEAT schedules and leads a meeting for First-Time Attendees on the first day of the Products Liability Conference for First-Time Attendees to meet their Ambassadors, as well as answering questions about the Conference and the Products Committee and discussing specific ways to get involved in the Products Liability Steering Committee.

5. The MEAT contacts all lapsed DRI members who were formerly in the Products Committee.

6. The Membership Chair and Vice Chair will obtain a list of all individuals who attended DRI Products Seminars to determine which ones are not DRI members and which ones are not Products Committee members. Once that information is acquired, the Membership Chair and Vice Chair will assign members of the MAC to reach out to these individuals to encourage them to join DRI and/or the Products Committee.

7. The Membership Chair and Vice Chair will continue to remind Products Liability Committee members to encourage their colleagues to join DRI and/or the Products Committee.

8. The Membership Chair and Vice Chair will encourage all Products Committee members to attend DRI's Annual Meeting and to attend the Products Committee's meeting while there.

9. The Membership Chair and Vice Chair will continue to promote attendance of DRI Annual Meeting and Products Committee meeting on social media and other available online platforms.

10. The Membership Chair and Vice Chair will continue to promote the Products Committee, its members, and its activities through Social Media Platforms (LinkedIn, Facebook, Twitter/X, Instagram).

DRI PRODUCTS LIABILITY COMMITTEE PLAYBOOK

(Got a Question? Just flip through these pages and watch your worries vanish faster than a defective product recall)

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9. Fire Science & Litigation
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14. Diversity SLC Liaison
15. Women in the Law SLC Liaison
16. DRI for Life (aka Blue Zone) Liaison

Leadership

- Committee Chair
- Committee Vice Chair
- Immediate Past Chair
- Board Liaison

- 2024 Program Chair
- 2024 Program Vice Chair
- Law Institute Liaison
- Law Institute Liaison (Strictly Auto)
- Law Institute Liaison (Fire Science)

II. DRI PRODUCTS LEADERSHIP JOB DESCRIPTIONS

The DRI Product Liability Committee has a large Steering Committee, filled with many opportunities for people to be actively involved in the Committee's activities. In addition to the responsibilities outlined below, Steering Committee members are expected to attend

1. The DRI Product Liability Conference in February,
2. The Steering Committee Fly-In Meeting in April, and
3. The DRI Annual Meeting in October.

These are when the core in-person business meetings occur. Additionally, the Committee hosts monthly virtual Committee meetings, which Steering Committee members are expected to attend when feasible.

Committee Chair and Vice-Chair

The Committee Chair and Vice-Chair are responsible for general oversight of the Committee, including making leadership appointments, oversight of all programs and Committee activities, and reporting to the Board of Directors regarding Committee status and strategies. These are two-year positions that transition in October at the Annual Meeting.

Notes, tips, and advice:
- Reserve dates for the Fly-In as soon as possible, preferably within a month of the previous Fly-In (e.g., May or June).

Program Chair and Vice Chair

The Program Chair and Vice Chair are responsible for planning of the DRI Product Liability Conference main stage program and general coordination of the Conference. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

Notes, tips, and advice:
- For "Quick Hit" Mainstage Presentations, make sure the speaker agrees to the unique "Quick Hit" format at the time he or she agrees to speak. Make sure he or she understands that while Quick Hits are typically shorter (app. 20 minutes total) than other mainstage presentations, that does not mean he or she should attempt to fit a one-hour "canned" program into 20 minutes. It should be its own presentation specifically tailored for the unique "Quick Hit" format. For specifics, please see the below GUIDELINES FOR "QUICK HIT" MAINSTAGE PRESENTATIONS (Section VI).

- Assign a liaison from the planning committee for each Mainstage speaker and panel. The liaison is responsible for handling all the details of that presentation/panel, including, but not limited to:
  - Ensuring the panel/speaker, for whom he or she is responsible, registers for the Conference. For any requested exception, the liaison is responsible for confirming the exception with DRI and should not grant the exception unilaterally without confirming with DRI first.
  - Ensuring the panel/speaker, for whom he or she is responsible, attends the Virtual Faculty Meeting in advance of the Conference. The liaison should attend the Virtual Faculty Meeting as well.
  - Ensuring the panel/speaker, for whom he or she is responsible, attends the required onsite "AV Check" (aka Presentation Run Through) on the day of the presentation. The liaison should attend the "AV Check" as well.

SLG Coordinator and Vice Coordinator

The SLG Chair and Vice Chair are responsible for managing, coordinating, and overseeing all SLG programming at the DRI Product Liability Conference. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

Membership Chair and Vice Chair

The Membership Chair and Vice Chair are responsible for helping the Committee achieve membership goals, including soliciting Committee members to recruit new DRI members for the Committee and reaching out to past members to encourage renewal of memberships. For specifics, please see the below MEMBERSHIP PROTOCOL (Section VII). Both the Chair and Vice Chair are responsible for scheduling and leading monthly meetings for the Products Committee's Membership Action Committee ("MAC") made up of the

- Membership Chair and Vice Chair
- Committee Chair and Vice Chair
- The Welcoming & Engagement Chair
- The Ambassador Chair
- Young Lawyers Liaison
- Women in the Law Liaison
- Diversity, Equity, & Inclusion Liaison
- DRI Membership Liaison

The Membership Chair and Vice Chair are two-year positions that transition in October in conjunction with DRI's Annual Meeting.

Membership Engagement and Ambassador Team (MEAT)
Welcoming & Engagement Chair
Ambassador Chair

The Membership Engagement and Ambassador Team, instead of a Chair and Vice-Chair, is led by equal co-chairs: a Welcoming & Engagement Chair ("WEC") and an Ambassador Chair.

The Welcoming & Engagement Chair ("WEC") oversees welcoming new members, as well as reaching out to existing and former members of the Products Liability Committee to see if they are interested in getting involved in the Products Committee and working with the Products Steering Committee to ensure those members are placed in positions according to those members' interests.

The Ambassador Chair oversees the Ambassador Program, which seeks to connect new attendees to the Committee's seminars to members of the Committee as well as other attendees of the seminars. Activities typically involve connecting with new attendees prior to the seminar through e-mail, pairing them with a "mentor," and hosting a "First-Timers" Meeting on the first day of the seminar, as well as planning other potential activities during the seminar for new attendees.

Both chairs are responsible for reaching out to new members of the committee and determining (1) if they are attending an upcoming Products Conference and/or (2) whether they are interested in getting more involved in the Products Committee, encouraging new members to do one or both of these two options. If they are attending an upcoming Conference, the Ambassador Chair will reach out to the new members to enroll them in the Ambassador Program. Otherwise, the WEC will reach out to the new members to determine how to get them involved on the Products Committee.

These are two-year positions that transition in October in conjunction with DRI's Annual Meeting.

Marketing Chair and Vice Chair

The Marketing Chair and Vice Chair execute and oversee advertising and marketing of the Products Committee events, including the annual convention. Duties include working with Committee leadership to develop a marketing plan and advertise Committee events via multiple channels such as DRI and personal social media platforms like LinkedIn and Facebook, DRI Community pages, and through the use of targeted phone calls and emails to the membership of the Committee. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

Social Media & Online Communities Chair and Vice Chair

The Social Media & Online Communities Chair and Vice Chair are responsible for coordinating with DRI to recognize happenings of the Products Committee with a specific emphasis on promoting the annual Products Liability Conference. This includes coordinating postings of information on the DRI Product Liability My Communities Page, as well as social network sites such as Linked In, Facebook, etc. The Chair and Vice Chair should use these platforms to recognize Products Committee member wins (e.g., trials, hearings, etc.) as well as professional accolades. This committee is responsible for ensuring the other committees and Specialized Litigation Groups on the Products Liability Steering Committee are

utilizing the My Communities Page to promote their respective tasks, roles, and opportunities. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

Publications Chair and Vice Chair

The Publications Chair and Vice Chair coordinate the Committee's submissions of substantive articles to DRI's quarterly publication, *For the Defense*. These are two-year positions that transition in October in conjunction with DRI's Annual Meeting.

Networking Chair and Vice Chair

The Networking Chair and Vice Chair are responsible for planning unique, interesting, and engaging networking opportunities tailored to the location of the seminar. These activities will permit seminar attendees to socialize with DRI colleagues new and old and foster potential business development opportunities in an informal setting. This subcommittee will work with the DRI program chair, committee leadership, and DRI staff to identify, plan, and market these networking events. These are one-year positions that transition in February with the DRI Product Liability Conference.

Client Concierge Chair and Vice Chair

The Client Concierge Chair and Vice-Chair work with DRI to contact and collaborate with client companies to help plan and coordinate Panel Counsel Meetings at the annual Products Liability Conference and to facilitate a roundtable discussion for Corporate Counsel and serve as a liaison as between DRI and corporate clients. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

Sponsorship Chair and Vice Chair

The Sponsorship Chair and Vice Chair work hand-in-hand with DRI to present law firms and vendors with a variety of promotional and advertising opportunities at the annual Product Liability Conference. These sponsorship "investments" from law firms and vendors enable DRI to offer the highest quality program at desirable venues, while also providing the sponsors with coveted recognition and seminar benefits. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

DRI Cares Liaisons

DRI Cares Chair and Vice Chair works hand-in-hand with the larger DRI Cares Committee to plan a project at each annual Products Liability Conference that will benefit a local charitable organization. Such planning usually involves raising money to fund the project. These are one-year positions that transition in February in conjunction with the Product Liability Conference.

DRI for Life Chair

The DRI for Life Chair works with DRI and the Products Steering Committee to plan events at each annual Products Liability Conference that would promote a healthy lifestyle, including group runs, walking tours, guided meditation, etc. This is a one-year position that transitions in February in conjunction with the Product Liability Conference.

Annual Meeting Liaison and Vice Liaison

The Annual Meeting Liaison and Vice-Liaison coordinate with the Products Liability and Annual Meeting Steering Committees to plan the Products Liability breakout session and/or business meeting at the DRI Annual Meeting, including a Networking Event that typically is a dinner or happy hour. These are one-year positions that transitions in October in conjunction with DRI's Annual Meeting.

Corporate Counsel SLC Liaison, In-House Liaison, and Vice-Liaison

The Corporate Counsel SLC Liaison, In-House Liaison, and Vice-Liaison, work with DRI and the Products Steering Committee to increase client participation on the Steering Committee and at the annual Products Conference. Their duties include working with the Client Concierge Committee in planning a roundtable discussion for attending corporate counsel at the annual Products Conference. These are one-year positions that transition in October in conjunction with DRI's Annual Meeting.

Diversity, Equity, & Inclusion Liaison SLC Liaison

The Diversity SLC Liaison works with DRI and the Products Steering Committee to increase diversity inclusion and participation on the Steering Committee and at the annual Products Conference. The Liaison's duties include planning a networking event at the annual Products Conference (typically a lunch but can be whatever the liaison believes is best for that year's conference). This is a one-year position that transitions in February in conjunction with the Product Liability Conference.

Women in the Law Liaison

The Women in the Law Liaison works with DRI and the Products Steering Committee to increase gender awareness, inclusion, and participation on the Products Steering Committee and at the annual Products Conference. The Liaison's duties include planning a networking event at the annual Products Conference (typically a lunch but can be whatever the liaison believes is best for that year's conference). This is a one-year position that transitions in February in conjunction with the Product Liability Conference.

Young Lawyers Committee Chair, Vice Chair, and Marketing Liaison[1]

The Young Lawyer Chair, Vice-Chair, and Marketing Liaison are tasked with (1) planning and leading the Young Lawyers breakout session at the annual Products Conference (2) hosting a Young Lawyers dinner at the annual Products Conference, and (3) preparing the annual product liability case law update, which is shared with all conference attendees.

Specialty Litigation Groups (SLGs)

The Product Liability Committee has 16 SLG subcommittees, which include:

1. ACMIE (Agricultural, Construction, Mining, and Industrial Equipment)
2. Automotive
3. Aviation
4. Biomechanics and Injury Causation
5. Construction/Aerial Devices and Building Products
6. Chemical and Toxic Tort
7. Children's Products
8. Digital Evidence and Litigation Technology
9. Fire Science & Litigation
10. Food Law
11. Hand & Power Tools
12. International Legal Issues
13. Mass Torts & Class Actions
14. Recreational Products
15. Regulatory, Risk, and Safety
16. Young Lawyers

Chair, Vice Chair, and Marketing Chairs of SLGs

Each SLG has a Chair, Vice Chair and Marketing Chair. The SLG Chair is responsible for planning an SLG session involving 2-3 speakers/panels at the annual Products Conference (which may be held jointly with another SLG), and maintaining a membership list to drive engagement and discussion among SLG members. The Chair is assisted by a Vice Chair (two-year position), Marketing Chair (two-year position) and potentially an in-house chair (ad hoc). The SLG Marketing Chair also participates in the Marketing Committee, working with the Committee Marketing Chair and Vice Chair. The SLG leadership positions transition in February in conjunction with the DRI Product Liability Conference.

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[1] The YL Chair and Vice-Chair are different positions than the YL Liaison and Vice-Liaison, although there can be, and often is, overlap. The main differences are (1) the Young Lawyer Committee (YLC) names the YL Liaison and Vice-Liaison, while the Products Committee names the YL Chair and Vice-Chair; (2) the YL Liaison and Vice-Liaison are one-year positions, while the YL Chair and Vice-Chair are two year positions; and (3) the YL Liaison and Vice-Liaison positions begin in October, while the YL Chair and Vice-Chair positions begin in February.

Automotive and Fire Science SLG Chairs, Vice Chairs and Marketing Chairs

In addition to the above SLG duties, the Chairs of the Automotive and Fire Science SLGs also conduct their own substantive programming, with the Strictly Auto and Fire Science & Litigation Seminars that occur every other year in August/September.

III. SLG RESPONSIBILITIES

SLG Chairs

Becoming involved in the programming is a great way to get to know other lawyers and clients who practice in your area and expand your network. You are responsible to coordinate the program for your SLG. This includes choosing the topic, selecting the speaker, obtaining the speakers bio and photo and engaging your members to attend the presentation. This is not a huge time commitment, but it is a really important job to ensuring the success of the program. You have a Vice Chair and a Marketing Chair who you can collaborate with to ensure that the program is relevant and can help out if you are busy. It is REALLY important that your collective team does their tasks. It does not take too much time. Many hands make light work – but if nobody is participating then the programming is non-existent.

Each SLG is assigned a Chair, Vice-Chair and Marketing Chair. The Vice Chair and a Marketing Chair assist the Chair in creating, coordinating, facilitating, and implementing the program; you can lean on each other to ensure that the program is relevant if and when you are busy with your practice. It is REALLY important that you and your collective team does their tasks. It does not take too much time. Many hands make light work – but if nobody is participating then the programming is non-existent.

List of Responsibilities and Timeline of Events

This memo includes important information for you in your efforts on behalf of your SLG this year. At the end of this document is a one page reference sheet setting out important dates for your SLG.

Each SLG needs a Chair, Vice Chair, and Marketing Chair. The Chair and Vice Chair of the Products Committee will appoint the Chair and Vice Chair of each Specialized Litigation Group and will look to you as to who might be a good Marketing Chair, if you have not done so already. It is recommended that you identify a lawyer who can develop into a leader of your SLG and inform the Chair and Vice Chair of the Committee.

> Note: Ask those who attend your meeting to invite members who want to get more involved to reach out to you or to the Committee Chair and/or Vice-Chair. This can be someone who has expressed an interest in getting involved in your SLG. The sooner you do this the better because marketing efforts will be ramping up at an earlier stage in the year in order to increase attendance.

Plan your program for your SLG Breakout Session. The SLGs are paired to ensure that attendance at each session is sufficient and robust. You will be collectively assigned a two-hour slot in the program. **You can put on a program with the SLG you are paired with or divide the time equally amongst your two SLGs.** If you are having issues with the pairing of the SLGs, please reach out to the Committee Chair and Vice-Chair to help identify synergies. SLG slot assignments are generally done on a rotating basis. For example, those SLG breakout sessions held on the Friday morning of the last seminar will likely be rotated to earlier in the seminar.

RESPONSIBILITIES

1. **YOU NEED TO DRAFT AND SUBMIT A PROGRAM TO THE SLG CHAIR, PROGRAM CHAIR AND COMMITTEE CHAIR AND VICE-CHAIR**

This draft should include proposed topics and proposed speakers. Please remember to ensure that your panels are diverse and provide different perspectives.

Some key rules for program development:

- Do not use speakers from your own firms or leaders of other SLGs.
- The leadership will review the programs to make sure that topics are not duplicative, that a speaker is not slotted for more than 1 SLG, that no one firm or vendor is over represented on the SLG and main stage programs, that we are not recycling speakers from the prior year and that we have diversity of speakers.
- You should not indicate to any speaker that they are confirmed for the program. The Law Institute and Committee Leadership have to review the total program to be sure there are no overlaps in topics, no concentration in speakers from any one law firm or company and to ensure the overall quality of the program.

Those who do not submit programs in a timely fashion will be at a disadvantage because others may have already submitted topics which overlap with a later submitted program. In that case, the program which was submitted earlier will have an advantage.

The brochure will be announced online on the deadline set out below. If the SLG Coordinator does not have your program in a timely fashion, it will result in your program information not being included in the brochure. This will impact marketing efforts.

2. **USE THE FORM PROVIDED BY THE SLG COORDINATOR FOR SUBMITTING YOUR PROGRAM.**

3. **ONCE APPROVED YOU NEED TO CONFIRM YOUR SPEAKERS PROMPTLY AND CONFIRM THEY ARE AVAILABLE AND WILLING TO ATTEND. THIS IS VERY IMPORTANT.**

4. **ONCE YOU HAVE CONFIRMED YOUR SPEAKERS, PLEASE MAINTAIN CONTACT WITH THEM REMINDING THEM OF THE DUE DATE OF THE MANUSCRIPT.**

5. REMEMBER THAT MANY STATES REQUIRE WRITTEN MATERIALS IN ORDER TO OBTAIN CLE CREDIT.

6. EACH SPEAKER OR PANEL OF SPEAKERS MUST HAVE WRITTEN MATERIALS SO THAT WE CAN OFFER GOOD VALUE IN TERMS OF CLE HOURS.

7. <u>IN-HOUSE COMP RULES</u>: DO NOT REPRESENT TO YOUR SPEAKER THAT ALL OF HIS OR HER COSTS WILL BE COVERED. <u>TIP</u>: A GOOD WAY TO ENSURE A COMP IS RECEIVED IS TO HAVE THE IN-HOUSE PERSON HOST A PANEL COUNSEL MEETING.

TIMETABLE AND CHECKLIST FOR SLG LEADERS

Month	Activity/Event
APRIL	
April 30, 2025	Fly-In Dinner
MAY	
May 1, 2025	Fly-In meeting
May 2025	Consider canvassing your SLG members or clients who are in your industry space on relevant topics. Email SLG members to solicit programming ideas
JUNE	
June 2025	Schedule meeting with SLG Vice-Chair to draft presentation ideas and consider potential speakers. Note: If planning a joint program- meet with the SLG you are paired with to discuss how you can address topics of interest to both groups.
JULY	
July 10, 2025	Draft program due to SLG coordinator and Program chair (see form attached), including the following information: • Title of presentation, • Proposed speakers, and • Short description of session (keep in mind diversity of panels)
July 23, 2025	First draft of Seminar Program due to Law Institute and DRI staff including all proposed speakers.
AUGUST	
August 1, 2025	SLG to finalize presentation title and description of program based on feedback from LI/DRI.
August 6, 2025	DRI Law Institute (LI) Rep and Staff approve or request Changes to Programming
August 11, 2025	• Speaker invites and bio requests sent to all speakers. • Inform speakers of requirements, guidelines, and comp rules (do this on the front end)
SEPTEMBER	
September 2025	Reach out to your speakers and ensure that they are aware of deadlines for manuscript (November 20, 2025).
September 6, 2025	Final Draft of Program sent to all speakers for approval.
September 6, 2025	Final Faculty grid with all contact information submitted to DRI Staff and LI Rep.
September 6, 2025	Final Program Complete.

September 21, 2025	Seminar is posted to the DRI website
OCTOBER	
Mid-October 2025	Bi-Weekly marketing calls start- each SLG needs to have someone attend.
Mid-October 2025	Send reminder to speakers regarding manuscripts .
NOVEMBER	
November 2025	Phone tree calls start.
November 20, 2025	Manuscripts are due to DRI.
DECEMBER	
Mid-December 2025	Check in with your speakers regarding PowerPoints
JANUARY	
January 2026	REGISTER FOR THE CONFERENCE
January 9, 2026	Confirm with SLG Chair that you have: • Contacted your speakers and • Registered for the meeting.
FEBRUARY	
February 4, 2026	Confirm you have sent DRI and SLG chair the AV requirements for your speakers.
February 11, 2026	Final email to faculty concerning faculty meeting location and other logistics.
February 14, 2026	PowerPoints due to DRI
February 18-20, 2026	**ATTEND THE CONFERENCE and ENJOY**

SLG PRESENTATION AND SPEAKERS' CHECKLIST

1. **Know your audience and the issues that matter most to them.** For program suggestions, reach out to in-house counsel and consult with your SLG chair and vice-chair. Focus the substance of your programs on issues of immediate relevance to your audience. Be clear on your specific objectives.

2. **Program titles are important.** Once you have articulated your program objectives, give your program a title that not only reflects its objectives, but that will also generate interest in the program and drive attendance.

3. **Aim for diversity of speakers and points of view.** For speaker suggestions, reach out to in-house counsel and consult with your broader committee. Invite at least two client speakers for your SLG session, particularly in-house counsel who are not your current clients. This is a great business development opportunity for you. Do not invite speakers from your own firms or leaders of other SLGs.

4. **Design your program to engage the audience.** Adults bring their own experience to every learning situation. Rather than have your speakers merely "transmit" information to the audience, incorporate ways for the audience to actively participate in the program. Interactive techniques can dramatically transform even a lecture. Some interactive strategies to consider are: polling or show of hands; group brainstorm; breakout groups; case studies; demonstrations; role plays; and video vignettes. If for example you are moderating a panel, and have a very large audience, you might ask audience members to submit questions electronically throughout the panel. It is critical that you have planning calls with your committee to plan your programming,

identify potential speakers – just like a trial, a good SLG presentation is all about the preparation.

5. **Work with your faculty to help them become more engaging speakers.**

   - It may more engaging for the audience (and easier for the speakers) if you host a panel discussion with diverse points of view, have speakers co-present, or run a series of short TED-style Talks.

   - Encourage your speakers to incorporate insights and examples from their own practices without merely reciting "war stories."

   - Make sure you communicate speaking times well in advance of the program. Make sure your speakers budget their time appropriately with the most time spent on the most important content. Assign a member of your Committee to be the timekeeper and signal speakers on time constraints (i.e. 5 minute warning)

   - It can be challenging to work with extremely busy lawyers who are volunteering their time.

     - At a minimum, hold regular pre-conference meetings to keep your faculty focused more on program outcome and delivery, and less on content.

     - Arrange a speakers' get together over lunch or dinner before your SLG session. This not only gives you and your speakers an opportunity to meet in person; it also allows you to make sure everyone is on the same page for the SLG Session.

     - Follow up with a run-through at the conference venue.

   - Prohibit PPTs with bullet points that the speaker merely reads. If a speaker wishes to use power point, try the story board approach. For examples of before and after PowerPoint slides: see The Extreme Makeover Edition (Before and After Slides), by Carmine Gallo (Sept 2012), Forbes.com.

6. **Practice, practice, practice.** Whether a speaker is a novice or has years of experience, everyone can benefit from practicing. Ask your speakers to do at least one run-through at their office with colleagues sitting in to give feedback and ask questions. Hold another run-through at the conference venue with the PPTs.

7. **Written materials are a must.** Because many states require written materials for CLE credit, each speaker must have written materials. To the extent possible, make program handouts practical. Ask faculty to provide checklists, sample language, reading lists and useful links.

8. **Encourage your faculty to follow these best practices for delivery.**

   - Focus on the audience. Gauge your speed of delivery, the need for repetition, clarification, illustration, and summary based on subtle cues from the audience, and make on-the-spot adjustments to the extent possible.

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- To the extent possible, don't confine yourself behind a table or a podium. When you move around the room, you and your material become more engaging. You also become a more engaging speaker when you make eye contact.

- Stop periodically to ask for questions, rather than waiting until the end of the program

9. **Help your speakers and your audience connect with each other.**

- To encourage networking and discussion, you could potentially group the audience into smaller group of 8-10, rather than theatre style, if possible.
- Encourage your speakers to arrive early to make sure they are comfortable with the set up and ready to start at the appointed time. In addition, encourage them to use the time to circulate throughout the room and introduce themselves to individuals in the audience before the session starts.

- Make it easy for the audience to ask questions and connect with speakers after the presentation by providing their contact information.

- Use social media to spread your message before, during, and after the program. LinkedIn, Twitter and Face Book can dramatically promote the reach and influence of your program.

10. **Pay close attention to program logistics.**

- **Avoid timing problems.**

  - Make sure your speakers have budgeted their time appropriately with the most time spent on the most important content.

  - You've already communicated speaking times to each speaker well in advance of the program. Now you need to make sure you keep them on track during the program.

  - Take into account timing for the full session including potential overruns as a result of audience questions or discussions. Timing can vary substantially between practice and live presentations.

  - If possible, start marshalling your audience to take their seats so your SLG Session gets started (and ends) on time.

- **Avoid technical problems.** Load all PPTs on one laptop so you can move seamlessly between presentations. Ask your speakers to bring their presentation on a USB key as a backup just in case. Make sure you give the PPTs a test run.
- **Don't forget about membership.** To develop SLG member rolls, make an announcement inviting non-DRI members to join DRI, and have membership forms available. Remind audience members to sign the sign-in sheet.

11. **Collect program feedback and act on it.**

- Collect feedback as quickly as possible after the program. Solicit your committee following the group by email to ask for feedback on the program and what worked and what didn't, what they want to hear more of. Call in-house counsel who are part of your committee/industry group and solicit feedback.

- In addition to specific program feedback, consider questions on other matters that will help you achieve even better programs (e.g. suggestions for future topics and future speakers).

- Consider the feedback and share it with your faculty. Repeat successful program techniques; address opportunities for improvement in future programs.

IV. GUIDELINES FOR "QUICK HIT" MAINSTAGE PRESENTATIONS

Quick Hit presentations are significantly different than other Mainstage Presentations. They are intended to inject energy into the normal mainstage programming. Accordingly, speakers who agree to give such a "Quick Hit" should understand the unique format **before agreeing to speak**, which loosely follows the "Ted Talk" format. The below guidelines should be sent to potential Quick Hit Speakers, **before they agree to speak**, so they will know what is expected of them on the frontend. Quick Hit Speakers should not agree to speak until reviewing the below:

1. Do not use a podium.
   a. Be comfortable addressing the audience directly.
   b. Practice standing still, planted firmly in one spot on stage. Watch out for pacing back and forth or shifting your weight from leg to leg.

2. They are **less than 20 minutes long** and are typically delivered by a single presenter.

3. They include three sections: an introduction, evidence, and a conclusion.

4. No panels or audience Q&A are permitted.

5. Your presentation should have one topic:
   a. Craft your message around that topic.
   b. Keep the message clear and concise.
   c. Define a key takeaway for the audience.

6. Your structure should be invisible to the audience. In other words, don't talk about how you're going to talk about your topic – just talk about it!

7. Do not rely entirely on slides.
   a. Slides can be helpful for the audience, but they are by no means necessary or relevant. Ask yourself: Would my slides help and clarify information for the audience or would

they distract and confuse them? Some great examples of slides can be found in the talks by Dan Phillips, Jarrett Krosoczka, and Rick Guidotti on TED.com.
  b. The most important rule for slides: Keep it simple.
  c. What goes in slides?
  - Images and photos: To help the audience remember a person, place or thing you mention, you might use images or photos.
  - Graphs and infographics - Keep graphs visually clear, even if the content is complex. Each graph should make only one point.
  - No slide should support more than one point.
  - Use as little text as possible -- if your audience is reading, they are not listening.
  - Avoid using bullet points. Consider putting different points on different slides.
  - Use font size 42 points or larger.
  - Choose a common sans serif font (like Helvetica or Verdana) over a serif font (like Times).
  - Don't put any information or visuals in the far corners of your slides.
  - Only use images **that you own or have permission to use**.

V. DRI PRODUCTS MEMBERSHIP PROTOCOLS

The below membership protocols are meant to ensure future committees will not have to start from scratch to implement and follow proven methods of adding new members and retaining current members, to ensure that all members are engaged and active in the Products Committee. This membership plan should constantly be refined and updated as strategies are determined to be effective.

1. Each year, the Committee Chair should form a Membership Action Committee (MAC) comprised of the following:
   a. Committee Chair and Vice-Chair
   b. Membership Chair and Vice-Chair
   c. Membership Engagement and Ambassador Team (MEAT)
      i. Welcoming and Engagement Chair
      ii. Ambassador Chair
   d. Diversity, Equity, & Inclusion Liaison
   e. WITL Liaison
   f. Young Lawyer Liaison
   g. DRI Membership Liaison

2. The goal of the MAC is to
   a. Identify DRI members not currently involved on the Products Steering Committee.
   b. Contact these members and invite them to attend monthly steering committee meetings.
   c. Inform these members on how to get involved on the steering committee:
      i. SLG positions
      ii. Other areas of interest (e.g., publications, etc.)

      iii.   Make sure these members are put in touch with the chairs of these SLGs or committees and follow up afterwards.

   d. A special emphasis is to be made to identify and contact members on the D&I, WITL, and YL Committees.

      i.   E-mail from the Committee Chair before the Products Conference promoting attendance and explaining the "flow" of the conference and key meeting events.

      ii.   Committee Chair to work with the above liaisons for these committees to identify things specific to each committee that the Steering Committee must do to attract members and involvement.

      iii.   In contacting and identifying members on the D&I, WITL, and YL Committees for leadership, attempt to gauge if there are budgetary concerns (or the perception that one will not be able to participate because of budgetary concerns). If there are:

         1. Market and suggest DRI's Enterprise Membership Program, emphasizing its incentives.

         2. Be mindful that affinity group seminars and organizations (e.g.., NAPABA) can affect one's budget and perhaps even prevent one from being active in or joining the Steering Committee, or even participating in the Products Liability Committee's substantive events.

         3. If it is determined that the individual's law firm does not participate in the Enterprise Program, encourage the individual to ask his or her firm to participate, by sending information on the Program and its benefits (https://www.dri.org/docs/default-source/webdocs/other/enterprise-membership.pdf), which might allow the individual the budgetary funds needed to participate.

   e. A special emphasis is also to be made to reach out to members who were previously active and may have "fallen through the cracks."

3.   The Membership Chair and Vice Chair will schedule and host monthly MAC Meetings, but schedule weekly MAC meetings two months out from the annual Products Liability Conference.

4.   The Membership Engagement and Ambassador Team (MEAT) will make sure each new attendee for the annual Products Liability Conference is identified, contacted, and assigned an "ambassador" for each Conference. In order to do so, the below protocol should be followed:

   a. When Committee Chair, Committee Vice-Chair, Membership Chair, and/or Membership Vice Chair receive a list of New Members, they will send list to the MEAT. The MEAT will send a welcome e-mail to New Members,

      i.   Discussing the next Products Liability Conference,

      ii.   Encouraging New Members to attend, and

      iii.   Informing New Members of the Ambassador Program.

   b. No less than 30 days prior to the annual Products Liability Conference, the Committee Chair and/or Vice-Chair requests and receives a list of the Conference's First-Time Attendees and, in turn, sends this list to the MEAT.

   c. The MEAT assigns Ambassadors to ALL First-Time Attendees of the Products Liability Conference and sends an e-mail to First-Time Attendees,

       i.   Discussing the upcoming Products Liability Conference,

     ii.   Informing First-Time Attendees of the Ambassador Program, and

    iii.   Introducing each First-Time Attendee to his or her Ambassador.

   d. The MEAT schedules and leads a meeting for First-Time Attendees on the first day of the Products Liability Conference for First-Time Attendees to meet their Ambassadors, as well as answering questions about the Conference and the Products Committee and discussing specific ways to get involved in the Products Liability Steering Committee.

5. The MEAT contacts all lapsed DRI members who were formerly in the Products Committee.

6. The Membership Chair and Vice Chair will obtain a list of all individuals who attended DRI Products Seminars to determine which ones are not DRI members and which ones are not Products Committee members. Once that information is acquired, the Membership Chair and Vice Chair will assign members of the MAC to reach out to these individuals to encourage them to join DRI and/or the Products Committee.

7. The Membership Chair and Vice Chair will continue to remind Products Liability Committee members to encourage their colleagues to join DRI and/or the Products Committee.

8. The Membership Chair and Vice Chair will encourage all Products Committee members to attend DRI's Annual Meeting and to attend the Products Committee's meeting while there.

9. The Membership Chair and Vice Chair will continue to promote attendance of DRI Annual Meeting and Products Committee meeting on social media and other available online platforms.

10. The Membership Chair and Vice Chair will continue to promote the Products Committee, its members, and its activities through Social Media Platforms (LinkedIn, Facebook, Twitter/X, Instagram).

EX. A, SEMINAR PLANNING TEMPLATE

2025 Seminar Name

Seminar Dates
Hotel Name
City, State

<mark>Overview Introduction/Description (paragraph):</mark>

What You Will Learn (4-6 bullet points):
- 1
- 2
- 3
- 4
- 5
- 6

Expand Your Network (4-6 bullet points):
- 1
- 2
- 3
- 4
- 5
- 6

Presented by DRI's _____ Committee

<mark>Name</mark>
Committee Program Chair

<mark>Name</mark>
Committee Program Vice Chair

<mark>Name</mark>
Committee Chair

<mark>Name</mark>
Committee Vice Chair

<mark>Name</mark>
Law Institute

Program Schedule

Day 1, Date

Start Time	Session/Description/Speaker(s)	CLE
12:00 p.m.	**Registration Opens**	
3:00 p.m.	**Optional CLE**	1.0
4:00 p.m.	**Optional CLE**	1.0
TBD	**Small group networking (with hotel)** – Sign up, limited availability. DRI to provides at later date.	
5:30 p.m.	**Faculty Meeting** (not to be listed in agenda online)	
6:00 p.m.	**Networking/Cocktail Hour** (separate for each seminar if space allows)	
7:30 p.m.	**Dine Arounds**| Join colleagues and friends at selected restaurants for dinner (on your own) OPTIONAL	

Day 2, Date

Start Time	Session/Description/Speaker(s)	Program Format	CLE
8:00 a.m.	**AV rehearsals with day speakers (not to be listed in agenda online)**		
9 am – 12:45 p.m.	**DRI Cares – Blessings in a Backpack**	This will only be for a select number of seminars in 2025. Committees will be made aware if BIAB will be part of their seminar during the planning process.	
8:30 – 9:30 a.m.	**Coffee Service**		
8:30 a.m.	**Registration**		
9:00 a.m.	**Welcome and Introductions** Law Institute (Name, Firm, City, ST) Program Chair (Name, Firm, City, ST)		
9:15 a.m.	**Session Title** Session description Name, Firm, City, ST	Single Speaker Panel Fireside Chat Game Demonstration Roundtable	1.0
10:15 a.m.	**Break (Time cannot be adjusted)**		
10:30 a.m.	**DRI Insights Quick Hits (sponsorships)** – leave 1 hour for this. **DRI will inform the committee at the 120 days out mark if (a) premier sponsor(s) will take advantage of this opportunity.**	*DRI Education staff – check in with John Hovis on past year history of premier sponsors.*	

11:00 a.m. Or 11:30 a.m.	**Session Title** Session description Name, Firm, City, ST	Single Speaker Panel Fireside Chat Game Demonstration Roundtable	1.0
12:45 p.m.	**DRI Networking Lunch (Time cannot be adjusted)**		

CLE Tracks or Networking

	Session	**CLE**	**OR Networking Opportunities**
2:00 p.m.	**Session Title** Session description Name, Firm, City, ST		Small* group networking (with hotel) – Sign up, limited availability. DRI to provides at later date. *Small* is defined 20-25 people*
3:00 p.m.	**Session Title or Committee Business Meeting (open to all)** Session description Name, Firm, City, ST	1.0	Small* group networking (with hotel) – Sign up, limited availability. DRI to provides at later date. *Small* is defined 20-25 people*
4:00 p.m.	**Session Title or Committee Business Meeting (open to all)** Session description Name, Firm, City, ST	1.0	
5:00 p.m.	**Adjourn**		

6:00 p.m. – 8:00 p.m.	**Premier Networking Reception**| Join fellow seminar attendees at our Premier Networking Reception **(DRI secures - Location TBD)**	
8:00 p.m.	**Dine Arounds**| Join colleagues and friends at selected restaurants for dinner **(on your own) OPTIONAL**	

Day 3, Date			
Start Time	**Session/Description/Speaker(s)**	**Program Format**	**CLE**
8:00 a.m.	**AV rehearsals with day speakers (not to be listed in agenda online)**		
8:30 a.m.	**Registration & Coffee Service**		
9:00 a.m.	**Welcome and Announcements** Program Chair (introduces Program Vice Chair) Program Vice Chair (Name, Firm, City, ST)		
9:10 a.m.	**Session Title** Session description Name, Firm, City, ST	Single Speaker Panel Fireside Chat Game Demonstration Roundtable	1.0
10:10 a.m.	**Break (Time cannot be adjusted)**		
10:25 a.m.	**Session Title** Session description Name, Firm, City, ST	Single Speaker Panel Fireside Chat Game Demonstration Roundtable	1.0
11:25 a.m.	**Session Title – ETHICS** Session description Name, Firm, City, ST	Single Speaker Panel Fireside Chat Game Demonstration Roundtable	1.0
12:25 p.m.	**Adjourn**		

Faculty Bio (example)

Name is the executive vice president and general counsel at the Firm/Company Name in City. He or she coordinates/manages (brief list of chief responsibilities). Mr./Ms./Dr. Name practices primarily in [areas]. He or she is a DRI member. [He or she is a member of DRI's ___, ___ and ___ Committees.]