



NALP 2009 Annual Education Conference

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The Mess Called MCLE: Tips and Best Practices for Managing Continuing Legal Education Rules & Regulations at Your Firm

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Getting Started

Establish a Policy

Firm Policy for Applying for CLE Credit	Firm Attorneys	Clients
Apply in all the jurisdictions with MCLE requirements <i>(note: not all jurisdictions allow law firms to be providers)</i>		
Apply only in the jurisdictions that participants request CLE credit <i>(note: some jurisdictions do not allow applications to be submitted after the program)</i>		
Apply in all the jurisdictions where your attorneys are licensed		
Apply only in the jurisdictions your firm has offices, provide materials for attorneys to apply on their own for all other jurisdictions		
Do not apply for CLE credit, instead provide appropriate documents for attorneys to apply on their own <i>(note: some jurisdictions do not allow attorneys to apply on their own)</i>		

Do Your Research

Interpreting MCLE Rules and Regulations

- Familiarize yourself with each state bar website
- Collect the same information from each website
- Compile the information into one document

Who's Doing the Dirty Work?

Identify the Players

- Firmwide professional development
 - CLE administrator
 - Local training contacts
- Practice area coordinators
 - Secretaries
 - Paralegals
 - Associates
- Marketing department

Getting the Word Out

Policies and Procedures Manual

- Clearly state your firm's policy:
 - Bar admissions tracking?
 - CLE compliance tracking?
- Include CLE program requirements
- Include checklists and templates
- List outside CLE providers and resources
- Distribute to all attorneys, training contacts and marketing contacts

Your New Favorite Document

Program Checklist

- Format as user-friendly as possible
- Key items include:
 - Program information (title, date, presenter, etc.)
 - Credit hours offered
 - Category of credit
 - Format of program
 - Required attachments

The CLE Police

Enforce Your Firm's Guidelines Across All Offices

- Avoids cross-jurisdiction CLE issues
- Ensures hardcopy files are compliant with rules and regulations of state CLE Boards

Apply Yourself

CLE Accreditation and Compliance

State	Application	Basis for 1.0 Credit	App Fee	Required Supporting Docs	Add'l Docs for Firm Accounting	Add'l Notes	MCLE Address	Attendance Reporting Requirements
Texas (TX)	Application	60 min; round to nearest .25 hr	\$75.00, payable to State Bar of Texas	Timed Agenda, Bios	Highlight Payment Option A on copy of application and submit page 28-30 of MCLE Regulations. See binder.	"Interactive webconference/teleconference" terminology accepted.	State Bar of Texas Minimum Continuing Legal Education 1414 Colorado Street, Suite 503 Austin, TX 78701	Report via MCLE website. ID - 00000. Password - XXXXXX. Email template to attendees.
Virginia (VA)	Application	60 min	\$50.00, payable to Treasurer of Virginia	Timed Agenda, Bios, Presentation Materials	None - fee listed on application	Always circle "In-house," "Open," "Group Setting," and "Live." See sample applications in binder.	Virginia MCLE Board Virginia State Bar 707 East Main Street, Suite 1500 Richmond, VA 23219-2800	Attach VA Certification of Attendance to template email.
Washington (WA)	WSBA Website	60 min	\$85.00 (Application and late fee)	Timed Agenda, Bios	Local Expense form for reimbursement when applying online. Print out confirmation of payment from WSBA website.	Apply online via WSBA website. Login: Xxxxxx, Password: xxx. Be sure to check back periodically to see if program is approved since they do not notify you otherwise.	Washington State Bar Association	Submit attendance via website once approved. Template email to attendees.

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And Now a Word from Our Sponsor

Tracking CLE Program Status

Program Type	Program Name	Date	Speakers	Time	Delivery Method	Target Audience	CLE credits (50/60)	Category	Applications by State	Notes
VENDOR	Copyright Essentials: The Nuts and Bolts of Protecting Your Work	Feb 12, 2008	Cydney Tune (Pillsbury Winthrop)	12:30-2:00pm	Audioconference (Main CC-A/B)	All Attorneys	1.0/1.0	General	Certificates sent to attys from vendor	
FIRM/ TARGET ATTY	Communications 101: Practice Overview	May 13, 2008	Dick Wiley	5:00-7:00pm	Live (10E CC)	Associates (mand for new Comm), Legal Asst, Project Asst	2.4/2.0	General	VA (2.0) - CLE email 7/18/08	
CLIENT	Lobbying Compliance: Form LD 203, Gifts and Gift Certifications	Jul 9, 2008	Jan Baran, Carol Laham, Rob Walker	1:30-2:30pm	Webcast	Clients	1.0/1.0	General	KS, OH, PA (0) KY (1.0) - CLE email 8/22/08 FL (1.0) - CLE email 8/13/08 TX (1.0) - CLE email 8/08/08 IL (.75) - CLE email 8/13/08 CA (1.0) - pending 9/11/08 IA (1.0) - CLE email 8/08/08 NM (1.0) - pending 10/02/08	
FIRM/ ALL ATTY	Ethical Issues in Information Management	Sep 5, 2008	Dale Hausman, Evan Corcoran, Tom Kirby, Larry Secrest	12:00-1:30pm	Live and VC (Main CC)	All Attorneys	1.0/1.0	Ethics		VIDEOTAPED, video credit approved

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Let's Work Together!

Working With Others

- Stay aware of who may organize CLE programs
 - Marketing department
 - Partners involved in client development
 - Individual practice groups
 - Associates committees
 - Local CLE contacts
- You must know what the firm is offering

In Case You Fell Asleep...

1. Establish a Policy
2. Do Your Research
3. Create a Framework of Who's Involved
4. Distribute a Policies and Procedures Manual
5. Get Organized and Stay Organized
6. Communicate Clearly and Often

Questions?



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