# Back to school… Have your lawyers met their CLE requirements?

The summer is coming to an end and the kids are headed back to school, but they aren't the only ones who require education and training. Why not use this time of year to review the Continuing Legal Education (CLE) requirements for members of your firm? You can ensure compliance, while also strategizing to determine which training opportunities are most beneficial to your practice as a whole.

Leaving this task to the individual attorneys may not be the most efficient choice. An associate may forget about changes in their state requirements or procrastinate until it is too late. Either of these circumstances can affect their ability to provide services to your clients, putting your firm in a difficult situation.

Another potential problem lies in choosing which CLE courses to take. If your attorneys are participating in courses that do little to further their knowledge of skill set, then the firm is essentially wasting money. Your firm members need to choose CLE courses that fit into the overall direction of the practice or contribute to firm growth.

With the implementation of a firm-wide CLE tracking system, your law practice can proactively work to avoid these common CLE problems. You can use your system to properly manage CLEs and ensure that each partner and associate complies with their yearly requirement. But you can also use it to be more thoughtful about which CLE courses will have the greatest impact on your firm.

The following are a few suggestions for keeping track of your attorney's training requirements and getting the most out of your law firm's monetary investment.

## A firm-wide schedule

Develop and implement a practice policy about the completion of CLEs. Review the requirements of each lawyer's licensing state and create mandatory deadlines for completion. Use prescheduled email alerts to ensure that your lawyers don't forget about established deadlines. It may sound like a bit of micromanaging but remember that your attorneys are constantly juggling your clients' needs. A little reminder can go a long way in keeping them as individuals, as well as the entire firm, in compliance.

There is nothing worse than getting to the end of a reporting period and finding that half of your staff needs an exorbitant amount of CLE credits. Set up firm-wide requirements and space them out throughout the year to avoid last minute problems.

## Create a database

Develop a firm-wide database that allows every member to clearly review and keep track of their CLE credit completion. The database should include each partner and associate's CLE requirements, with regular updates when courses are completed. You can either assign this administrative task to a member of the firm or require your attorneys to update their own records on a monthly basis.

If your firm operates in different states, don't forget to review the requirements of each relevant state bar association and include them in the database. You may even have a situation where a single attorney is licensed in multiple states. Just make sure that the database includes up-to-date requirements for each to ensure the firm's good standing in all of them.

## Opportunity identification

CLE courses are constantly being offered. Keeping track of them all, in addition to handling the firm's numerous cases, can quickly become overwhelming. Why not assign one administrative member of the firm with the task of identifying CLE opportunities? That way, your partners and associates don't have to deal with the added responsibility of finding their own CLE courses. Make firm-wide announcements about upcoming CLE trainings and assist with the registration process.

You may also want to consider hosting a few CLE training courses at your firm. It can be a great way to network with other legal professionals within your state, while also establishing members of your firm as experts in your practice areas.

## Maintain records

If you decide against a firm-wide database, at least be sure to keep detailed records of your attorneys' compliance with CLE requirements. Obtain and keep documentation of CLE attendance, even if the provider of the CLE is sending proof of attendance directly to the state bar association. That way, should any questions or issues arise in the future, you will have the documentation to prove compliance.

## Be strategic

When identifying CLE opportunities, develop a strategy for choosing which courses your attorneys will take. You know what direction you want your firm to move in, and your CLE choices should reflect those goals. For example, if you are looking to strengthen your domestic relations practice, choose CLE courses that help you effectively further this goal.

It is also wise to choose CLE courses that support profitable trends in your practice or geographic area. Did a large manufacturing firm just open in your town? Perhaps some employment law or workers compensation training would help your firm capitalize on this new opportunity. Don't let your attorneys haphazardly choose random courses that don't benefit your practice. The firm is paying good money for this additional education. Shouldn't there be a positive return on this investment?

## Online opportunities

Most states allow lawyers to satisfy at least some of their CLE requirements with online CLE courses, which can be less costly and more convenient. Your attorneys can either participate in live webcasts, or access prerecorded videos. Either way, they can avoid spending additional time away from the office to attend a live CLE course. This is particularly relevant if your law office is located within an area where class are seldom offered.

Organizations like Lawline and LexVid offer numerous online CLE courses that comply with various state requirements. You may even be able to benefit from a bundle package, where you pay a set amount each year to access an unlimited number of CLE courses. The ABA also offers online courses, and some of them are even free to access. So, make sure you are looking out for virtual opportunities to keep your attorneys in compliance.

---

**About Erika Winston:**

*Erika Winston is a freelance writer with a passion for law. Through her business, The Legal Writing Studio, she helps legal professionals deliver effective written messages. Erika is a regular contributor to TimeSolv and a variety of other publications.*