

QUALIFYING ACTIVITIES FOR MCLE CREDIT

Factors used in evaluating an activity

To be approved for MCLE credit, a single activity is evaluated using the following criteria:

- The activity must relate to legal subjects relevant to members of the State Bar or must have significant and current professional or practical content.
- The presenters or faculty must have significant professional or academic experience related to the topic being presented.
- The intended audience must be primarily members of the State Bar. (For example, courses intended for paralegals or other professionals do not qualify.)
- The written or electronic materials that accompany the activity must be suitable and easily understood; for all activities that are one hour or more in length, substantive written materials must now be made available either before or during the activity.
- Any materials provided online must remain online for at least 30 calendar days following the MCLE activity.

Examples of activities that do not qualify for MCLE credit

- A legal subject taught to non-attorneys
- Programs or portions of an activity designed to teach attorneys how to improve marketing, develop new clients or increase revenue
- Writing for, to or on behalf of a client in the regular practice of law
- Jury duty
- Programs designed to teach or enhance a person's ability to prepare and present an MCLE activity
- Reviewing and evaluating the legal work of associates or other attorneys by more experienced attorneys (for example, performance evaluations or a mentor program)
- Grading the California Bar Exam
- Acting as a judge pro tem, mediator, arbitrator (public or private)
- Acting as a supervising attorney in the California State Bar's Law Office Study Program
- Programs that discuss pending court case or litigation, an appeal or any client matter by the participants in the pending case, litigation appeal or client matter
- Activities primarily intended to market or sell the presenter's technology, products, services or skills
- Time spent in conducting a roll call or connecting to the teleconference
- Online discussions or written comments posted on public forums
- Courses on general business writing or basic English grammar
- Informal discussion groups

- Preparation for admission to practice law in any state, the District of Columbia, and territory of the U.S., or any foreign jurisdiction, or for time spent actually taking such examinations
- Time spent in reading or studying published or printed material before taking a self-assessment test
- Participating in or judging a moot court or mock trial activity
- Educational programs on mentoring new attorneys

Examples of activities that do qualify for MCLE credit

Activities relating to the management of a law practice or law office are eligible for approval if they have significant practical content, are directly relevant to members and are related to the practice of law, including, but not limited to:

- Case management and effective calendaring
- Malpractice avoidance
- Maintenance of ethical attorney communications and attorney-client relationships
- Ethical management of client trust funds and other law office financial affairs
- Operational management of a solo law office, law firm or corporate law department

Qualifying an activity for special credit hours

Licensed California attorneys are required to complete at least 25 hours of continuing legal education every three years; this requirement includes: a minimum of four hours of Legal Ethics, at least one hour of education regarding the Recognition and Elimination of Bias in the legal profession or society, and at least one hour of education addressing substance abuse or other mental and physical issues that may impair an attorney's ability to perform legal services with competence.

Legal ethics

Legal ethics must focus on the professional responsibility of attorneys and not on the ethics of business, corporate or government affairs or society in general. For example, activities that educate attorneys on the California Rules of Professional Conduct are eligible for ethics credit, but activities that focus on ethical dilemmas encountered in society, a business or a non-legal profession do not qualify for MCLE legal ethics credit.

Recognition and elimination of bias in the legal profession and society

Activities that qualify for such credit now include any form of bias found in either the legal profession or in society in general. Activities that now qualify for credit include education in the recognition and elimination of impermissible bias in the courtroom, law office, attorney-client relationships and relationships with other attorneys, legal and non-legal employment, the workplace, the hiring, management and termination of employees and in housing,

accommodations and services. Courses required by AB1825 (mandatory sexual harassment awareness and prevention training for personnel managers) will now be approved for credit regarding the recognition and elimination of bias.

Education regarding substance abuse, mental or physical issues that impair professional competence

Approved activities must consist of education that identifies and discusses the detection of substance abuse, mental illness or other mental or physical issue that impairs a member's ability to perform legal services with competence. Courses designed and offered that discuss or provide treatment for any of the mental, emotional, or physical issues that affect professional competence do not qualify for credit in this subfield (e.g. alcohol and drug treatment, meditation or other forms of stress management.)

Qualifying online activities

Online activities may be eligible for either self-study or verified (participatory) credit.

- Activities must offer attendees a reasonable opportunity to both view and participate in the program.
- Credit is limited to the actual time spent in an online legal education activity.
- Members may claim MCLE credit for speaking at or instructing an approved online educational activity generally in accordance with Rule 2.81. (For example, a member who is an instructor of an online course may receive credit for the actual time spent speaking, multiplied by four.)
- Written materials are required for all activities that are one hour or more in length.
- Evaluation forms must be provided to attendees for all activities.
- Certificates of attendance can be provided online in printed form.
- Attendees must receive adequate advance written or electronic notification concerning how to access these materials, and, in the case of evaluation forms, how to return them.
- Materials provided online must be available online for at least 30 calendar days following the activity.
- The provider of an online activity may obtain signatures electronically.
- The provider must retain copies of all electronic signatures (including all attendee's bar identification number), written material, evaluation forms and records of attendance in a manner that is open and available for audit.