

## **Revisions to the CPD Policy (effective January 1, 2018)**

As you know, we are in the midst of completing a comprehensive review of our CPD program, and as part of that review, we conducted a survey to solicit feedback from our members. We received significant response from the profession, and overall, our members reported general satisfaction with the existing CPD Program. We also received some helpful suggestions for improvement, all of which we are examining, along with other data and research, in an effort to assess this important program and to explore opportunities for improvement.

***We have now completed the first stage of our review and have made a number of revisions to the CPD Policy, effective January 1, 2018. The substantial revisions can be summarized as follows:***

***The following topics are now eligible for CPD hours:***

- ***Basic Technology and Office Systems Training***
- ***Leadership (in the legal context)***
- ***Project Management (in the legal context)***
- ***Governance Issues and Processes***
- ***Professional Wellness***

***As well, the type of technology training that qualifies for ethics hours has been expanded.***

We have revised Schedule B (Criteria for Ethics Hours) and added Schedule C (Lawyering Skills) and Schedule D (Professional Wellness) to provide further clarity related to these topics.

### ***Schedule B - Criteria for Ethics Hours:***

Technology training that qualifies for ethics hours has been expanded to include:

- Training related to technology and office systems that may be used in, or impact, the operation of a legal practice.

Client record management, cyber security and paperless office best practices were specifically added as examples of eligible technology topics which qualify for ethics hours.

### ***Schedule C – Lawyering Skills***

Although many of the topics in Schedule C were previously eligible for CPD hours, this Schedule has been created to provide further clarity and to add several topics not previously eligible for CPD hours.

The following technology topics now qualify for CPD hours (but are distinguished from the technology topics listed in Schedule B which qualify for ethics hours):

- training to increase a lawyer's proficiency in specific technologies or office computer programs which are used in their practice of law, for example:

- e-filing;
- e-discovery;
- software programs designed to assist with a specific area of law (e.g. Childview);
- document and word processing software, electronic spreadsheets, email systems, personal information management systems (e.g. Microsoft Office Suite).

The following lawyering skills topics have also been added as eligible CPD topics:

- Leadership (in the legal context)
- Project management (in the legal context)
- Governance Issues and Processes

### ***Schedule D – Professional Wellness***

Eligible “Professional Wellness” programs are defined as:

Educational programs designed to help lawyers detect, prevent or respond to substance use problems, mental health or stress-related issues that can affect professional competence and the ability to fulfill a lawyer’s ethical and professional duties. Such educational programs must focus on these issues in the context of the practice of law and the impact these issues can have on the quality of legal services provided to the public.

Examples of Eligible Professional Wellness Topics are:

- alcohol and drug dependencies, addictive or self-harming behaviours, anxiety and depression, procrastination, isolation, boundary setting, burnout

Examples of Ineligible Professional Wellness topics:

- exercise classes
- yoga courses
- breathing exercises and meditation courses
- healthy eating courses
- courses addressing reevaluating personal career decisions or navigating career transitions
- counselling sessions and treatment programs
- learning activities that focus on personal life events and associated issues (e.g. personal trauma, grief and bereavement)

Please refer to the complete [CPD Policy](#) on our website for further details related to eligible CPD topics. We will continue to report to the membership as we progress through further stages of our CPD Program review.