

2007 Membership

Robert C. Heim, Esq., *Chair*
Kelly H. Shuster, Esq., *Vice Chair*
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Honorable Phyllis Beck
Samuel Tyrone Cooper III, Esq.
Leonard Dubin, Esq.
Martin Greitzer, Esq.
Abraham C. Reich, Esq.
Stuart Savett, Esq.
Lawrence Tabas, Esq.

Staff

Daniel Levering, *Administrator*
Katey Buggy, *Office Manager*

Legal Authorization

Title 204—Judicial System General Provisions Part V. Professional Ethics and Conduct [204 PA Code C. 82]
Pennsylvania Rules for Continuing Legal Education; No. 99 Supreme Court Rules Doc. No. 1

About the Board

The Continuing Legal Education Board administers the rules pertaining to continuing legal education (CLE) for attorneys.

The board is comprised of ten active Pennsylvania attorneys. Terms are three years in length, and members may serve two consecutive terms.

Continuing

Legal

Education

Board

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Compliance Requirements and Deadlines

Annual CLE credit-hour requirements are met by completion of accredited courses in the areas of substantive law, practice and procedure, ethics, professionalism or substance abuse. Lawyers must complete twelve hours of CLE, including a minimum of one hour of ethics, professionalism or substance abuse before the compliance year deadline.

Compliance deadlines and CLE requirements are based on one of three annual compliance periods to which lawyers have been randomly assigned. The annual deadline dates are April 30, August 31 or December 31.

Board Organization

To best accomplish the requirements set forth by the Pennsylvania Rules for Continuing Legal Education, the Continuing Legal Education Board is organized into three committees, each covering a major area of operations: Accreditation, Administration and Compliance. A description of each committee follows.

Accreditation Committee

The Accreditation Committee has three members: Samuel T. Cooper, III, Esq.; Leonard Dubin, Esq. and Stuart Savett, Esq. Its duties include oversight of the certification of providers and courses, CLE program standards, adequacy of course availability, and course and provider accreditation standards.

Administration Committee

The Administration Committee includes Robert C. Heim, Esq.; Kelly H. Shuster, Esq. and Samuel T. Cooper III, Esq. It handles matters involving staff, employee relations, benefits, office equipment, office operations, fees and banking, and those enhancements to program

administration necessary to ensure quality and efficiency. This committee also oversees the budget, annual independent audit and review of board operations.

Compliance Committee

Martin Greitzer, Esq.; Richard Antonelli, Esq. and Lawrence Tabas, Esq. comprise the Compliance Committee. This committee oversees attorney compliance; reviews requests for waivers, extensions and deferrals; reviews determination of lawyer noncompliance and makes recommendations to the board for action regarding these issues.

2007 Board Actions and Operations Highlights

The board held three meetings in 2007.

Distance Learning Teleconference Pilot Project

Two thousand seven marked the halfway point of the board's two-year pilot project to review and explore the accreditation of teleconferences as an additional form of distance learning. This type of class allows lawyers the option of earning CLE credit through participation in pre-approved telephone seminars offered by accredited providers. Credits earned in this method are considered distance learning credit and count towards the four-hour distance learning cap per compliance period.

A report and recommendation on Teleconference Accreditation will be filed with the Supreme Court in 2008.

Automated System for Accredited Providers (ASAP)

ASAP is an internally-developed Internet software that allows for the paperless reporting

of provider courses, course attendance and course evaluations. It is used by more than 250 accredited CLE providers. In 2007 82 percent of credit hours were reported electronically.

CLEReg: National Organization for Continuing Legal Education Regulators

Pennsylvania maintained a strong and active presence in the Organization for Continuing Legal Education Regulators (CLEReg) (formerly Organization of Regulatory Administrators, or ORACLE). Past president (2003) Dan Levering continued to serve on the Management and Technology committees. Office manager Katey Buggy served as vice president in 2007 and on the membership committee. Ms. Buggy will become president of CLEReg in 2008.

Two meetings were conducted in 2007.

Technology Update

The board held three successful disaster recovery exercises. In the event of disaster, it should be able to adequately reestablish technical operations within eight hours.

Other Accomplishments

The annual providers conference was held in June 2007 and included a presentation on Adult Learning Theory and Strategies, a discussion on professionalism and an update on Pennsylvania continuing legal education news.

Pursuant to Criminal Procedure Rule 801, "Qualifications for Defense Counsel in Capital Cases," the board accredited 88 capital counsel training programs as well as maintained an online mechanism to identify lawyers who have the requisite credits that allow them to serve as counsel in capital cases.

Attorney Compliance

Lawyer compliance rates with the CLE requirement remain extremely positive. Chart 3.6.1 on page 54 indicates the high percentage of lawyers who meet the rule requirements.

Looking Ahead to 2008

The board will work or continue to work on the following in 2008:

- major update to the Bridge the Gap Program and revision to the DVD. This update will encompass changes in the law as well as a modernized approach to the delivery of information and content.
- submission of a report and recommendation to the Supreme Court regarding the Teleconference (Distance Learning) Pilot Project, which will conclude in 2008
- transition to tapeless, Internet data backup process in an effort to reduce manual labor and increase efficiency
- telephone systems upgrade to Voice over IP (VOIP) technology. This project will prepare the office with compatible systems for the move to the Pennsylvania Judicial Center.
- expansion of online services for individual lawyers, including redesign of MyPACLE transcript pages, online payment options and e-mail subscriptions
- continued preparations ensure a smooth move of the board's data center and base of operations to the Pennsylvania Judicial Center.

AOPC

Attorney Compliance				
Compliance Group/ Year Ending	# Lawyers Subject to Requirements	# Lawyers Complying	# Lawyers Involuntarily Inactivated	Compliance Rates (%)
Group 1 (April)				
92-93	17,100	16,959	141	99.2
93-94	17,300	17,179	121	99.3
94-95	17,619	17,552	67	99.6
95-96	17,873	17,768	105	99.4
96-97	17,804	17,639	165	99.1
97-98	17,665	17,523	142	99.2
98-99	17,864	17,751	113	99.4
99-00	18,132	18,018	114	99.4
00-01	18,426	18,295	131	99.3
01-02	18,480	18,342	138	99.2
02-03	18,668	18,539	129	99.3
03-04	18,224	18,720	104	99.4
04-05	19,223	19,141	82	99.6
05-06	19,672	19,602	70	99.6
06-07	20,214	20,117	97	99.5
Group 2 (August)				
92-93	17,124	16,868	256	98.5
93-94	17,289	17,134	155	99.1
94-95	17,649	17,540	109	99.4
95-96	17,595	17,507	87	99.5
96-97	17,410	17,294	116	99.3
97-98	17,613	17,511	102	99.5
98-99	17,756	17,666	90	99.5
99-00	18,087	17,974	113	99.4
00-01	18,181	18,100	81	99.6
01-02	18,143	18,011	132	99.3
02-03	18,572	18,493	79	99.6
03-04	18,753	15,664	89	99.5
04-05	19,098	19,019	79	99.6
05-06	19,556	19,443	113	99.4
06-07	19,934	19,842	92	99.5
				continued...

Table 3.6.1

Attorney Compliance, continued				
Compliance Group/ Year Ending	# Lawyers Subject to Requirements	# Lawyers Complying	# Lawyers Involuntarily Inactivated	Compliance Rates (%)
Group 3 (December)				
92-93	17,269	16,936	333	98.1
93-94	17,474	17,414	60	99.7
94-95	17,679	17,574	105	99.4
95-96	17,542	17,430	112	99.4
96-97	17,582	17,456	126	99.3
97-98	17,781	17,647	134	99.2
98-99	17,968	17,865	103	99.4
99-00	18,220	18,113	107	99.4
00-01	18,361	18,227	134	99.3
01-02	18,479	18,366	113	99.4
02-03	18,625	18,527	98	99.5
03-04	18,887	18,792	95	99.5
04-05	19,443	19,347	96	99.5
05-06	19,882	19,797	85	99.6
06-07	20,231	20,107	124	99.4

Table 3.6.1, cont'd.