LAW SOCIETY OF ONTARIO
CPD ACCREDITATION
PROCESS CPDACC@LSO.CA

CONTINUING PROFESSIONAL DEVELOPMENT (CPD) ACCREDITATION

Application for Accreditation — Alternate Eligible Educational Activities (For Professionalism Content Only)

Application Instructions

Review the detailed instructions for applications for accreditation on the CPD Accreditation Process page and Sample CPD Accreditation Applications.

Submit a completed copy of this Application form by email to cpdacc@lso.ca and attach the supporting material(s) specified below.

Accreditation Processing and Deadlines

The Law Society deals with a high volume of Applications and the standard processing time for accreditation Applications is approximately **15 business days of receipt** of the Application. Incomplete Applications may require additional processing time.

Applications for accreditation of alternate eligible educational activities for Professionalism Hours may be submitted at any time prior to or following the activity date. Applications must be completed and submitted no later than **30 days prior to the commencement of the proposed activity** in order to facilitate accreditation in advance of the activity date.

Section 1: Contact Information

Name: Lawyer One   Law Society Number: 12345B

Address: One Lawyer Way

City: Toronto   Province: Ontario   Postal Code:

Contact Phone: (123) 456-7890   Contact Email: lawyerone@lawyerone.ca

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Section 2: Activity and Accreditation Information

In order to qualify for accreditation of Professionalism Hours, alternate eligible educational activities must address topics of professional responsibility, ethics, practice management and/or equality, diversity and inclusion.

Applicants are encouraged to review the Accreditation Criteria for Professionalism Hours prior to completing this section of the Application.

*Provide the information requested below for the activity for which you are seeking accreditation for Professionalism Hours, including **identifying the applicable professionalism topic(s)** and **describing the connection between the content and the professionalism topic(s)**.*

CPD03 10/2018

Teaching *(A maximum of six hours per calendar year is eligible)*

Agenda or outline attached:

Course/Session Title:

Date(s):

Provider or Organization:

Delivery Format (select all that apply):

Live in-Person Live Webcast Live Audio Interactive Online Course

Videoconference On-Demand DVD/Video Podcast

Other (please specify):

Professionalism Hours (*e.g.*, __ hours and __ minutes; 15 minute minimum)**:**

Total professionalism time requested (up to three times the actual teaching time to reflect actual preparation time):

EDI Professionalism Hours	All other Professionalism Hours (excluding EDI Professionalism Hours)

Professionalism Topic(s):

Brief description of the connection between content and Professionalism Topic(s):

☐ **Writing/Editing** *(A maximum of six hours per calendar year is eligible)*

Description or outline attached: ☐

Title of article or book:

Subject matter:

Co-author name (if applicable):

Approximate word count:

Published by:

Publication date:

If completed article is available online please provide address:

Professionalism Hours (*e.g.*,__ hours and__ minutes; 15 minute minimum):

Equality, Diversity and Inclusion ("EDI") Professionalism Hours	All other Professionalism Hours (excluding EDI Professionalism Hours)

Professionalism Topic(s):

Brief description of the connection between content and Professionalism Topic(s):

☒ **Mentoring, Coaching or Advising**

Agenda or outline attached: ☐

Note: *Review the Eligible Educational Activities webpage for descriptions of the types of eligible mentoring activities.*

Type of Mentoring, Coaching or Advising:

☒ Mentoring	☐ Being Mentored	☐ Acting as an Articling Principal
☐ Coaching	☐ Participating in a coach program	☐ Supervising an LPP Work Placement
☐ Advising	☐ Participating in an advisor program	☐ Supervising a Paralegal Field Placement

Name of other party and Law Society Number : Lawyer Two 23456A

Delivery Format (select all that apply):

☒ In-Person ☐ Telephone ☐ Videoconference ☐ Other (please specify):

Date and time of session(s)	Professionalism Topic(s)	EDI Professionalism Hours	All other Professionalism Hours (excluding EDI Professionalism Hours)
January 8, 2018	See attached agenda.		2
Total:		0	2

Brief description of the connection between content and Professionalism Topic(s) covered in each session

The purpose of this session was to discuss the importance of timely communications with clients. We reviewed best practices for client communication including when, where, why and how to communicate during the course of a client matter.

We also analyzed and discussed five client communication scenarios along with the applicable Rules of Professional Conduct and Practice Management Guidelines.

The entire session related to the topic of timely and effective client communication identified under the Accreditation Criteria for Professionalism Hours.

*If there are more than **three** sessions, set out the information about the additional parties and/ or sessions in Appendix "A" to this Application.*

☐ **Participating in a Study Group**

Agenda, outline and/or case studies attached: ☐

Number of participants:

Participant information:

Name	Law Society Number	Email Address

*If there are more than **five** participants, set out the information about the additional participants in Appendix "B" to this Application.*

Delivery Format (select all that apply):

☐ In-Person ☐ Telephone ☐ Videoconference ☐ Other (please specify):

Professionalism Hours (*e.g.*,__ hours, __ minutes; 15 minute minimum):

EDI Professionalism Hours	All other Professionalism Hours (excluding EDI Professionalism Hours)

Professionalism Topic(s):

Brief description of the connection between content and Professionalism Topic(s):

Section 3: Declaration

Please check the applicable box.

☐ Application submitted **before** activity date.
By submitting this Application, I confirm that the professionalism content requested will be completed in accordance with the materials and information provided. If the content varies from that which is presented in this Application and/or the accreditation granted, I agree to notify the Law Society immediately in order to adjust the credit available for the activity.

☒ Application submitted **after** activity date.
By submitting this Application, I confirm that the professionalism credit requested was completed in the alternate activity.

Name: Lawyer One Date: January 9, 2018

SAMPLE MENTORING AGENDA

TOPIC: TIMELY & EFFECTIVE CLIENT COMMUNICATION

Mentoring Session Date: January 8, 2018
Time: 10:00 A.M. – 12:00 P.M.
Place: 123 Corporate Place
Mentee: Lawyer Two

10:00 -11:00 **Client Communications – Who, What, When, Where and How**

- Who do you need to contact with updates?
    - Institutional client
    - Joint retainer
- What changes or updates need to be communicated to the client?
    - Are there changes to the costs?
    - Are there changes to timelines?
- When should you contact your client with updates?
    - Are updates required to retainer agreements or engagement letters?
- How often should you contact the client with updates?
    - Daily, Weekly, Monthly, Quarterly?
- Where should you meet the client to discuss changes?
    - Should you meet the client in person?
    - Is an email or phone call more appropriate?

Professionalism Topics Covered in this part of the meeting:

- 2.6 (Best practices for retainer agreements, engagement letters and non-engagement letters)
- 2.7 (Timely and effective client communication, including theory and practical application)
- 2.12 (Managing client expectations related to fees and disbursements)

Applicable *Rules of Professional Conduct*:

- 3.2-1 (Quality of Service)
- 3.2-2 (Honesty and Candour)

Other Practice Management Resources Referenced:

- Practice Management Guidelines – Client Service – 2.13, 2.14 and 2.15

11:00 – 12:00 **Client Communication Scenarios – Good and Bad**

Review and analysis of five client communication scenarios to ensure mentee can practically apply the information discussed above to simulated real life situations. For each scenario, the applicable *Rules of Professional Conduct* and Practice Management Guidelines will be reviewed.

Professionalism Topics Covered in this part of the meeting:

- 2.7 (Timely and effective client communication, including theory and practical application)

Applicable *Rules of Professional Conduct*:

- 3.2-1 (Quality of Service)
- 3.2-2 (Honesty and Candour)

Other Practice Management Resources Referenced:

- Practice Management Guidelines – Client Service – 2.13, 2.14 and 2.15