



NOVA SCOTIA BARRISTERS' SOCIETY

## EDUCATION PLAN – SHARED ARTICLES

Prior to developing an Education Plan, principals/supervising lawyers must review the skills outcomes listed in the [Competency Framework](#). The Education Plan must address all the lawyering skills listed in the Competency Framework. **Before creating your Education Plan, please contact the Education & Credentials Department at 902-422-1491 to discuss how best to structure the shared articles.**

A principal/supervising lawyer developing an Education Plan may borrow from what follows to whatever degree is appropriate. Only those experiences that will be provided to the articulated clerk(s) should be listed. Once a principal/supervising lawyer's Education Plan has been approved by the Executive Director, it can be used as a template for Education Plans and Articling Plans for individual articulated clerks.

### GENERAL

If the shared articles are structured such that the articulated clerk(s) has more than principal during the articling term, please provide the following information for each placement, and include the articling dates with each principal.

1. Principal Name (principal is individual): \_\_\_\_\_
2. Articling Dates: \_\_\_\_\_
3. Firm Name (firm is principal): \_\_\_\_\_
4. Supervising Lawyer Name (firm is principal): \_\_\_\_\_
5. Firm Address: \_\_\_\_\_  
\_\_\_\_\_
6. Number of Practising Lawyers in Firm: \_\_\_\_\_

### PRACTICE AREAS AND SUPERVISION

Please note that the Education Plan must provide for supervision during the entire articling term, including weekends and during the Bar Admission Program. Accordingly, when noting the dates of the various placements, please ensure that all dates in the calendar year are accounted for.

While it is recognized that each lawyer who assigns work to an articulated clerk will participate in the supervision, education and evaluation of the articulated clerk, the principal/supervising lawyer/secondment lawyer has responsibility to ensure proper supervision of the articulated clerk(s) throughout the placement. Accordingly, the principal/supervising lawyer/secondment lawyer should regularly consult with all lawyers with whom the articulated clerk(s) works during the placement.

In addition, the lawyers taking on the role of principal/supervising lawyer will be responsible for reporting to the Executive Director on the experience and competency of the articulated clerk(s). As a result, the principal/supervising lawyer should also consult with the secondment lawyers on the progress of the articulated clerk(s).

7. If the shared articles are structured such that the articulated clerk(s) has more than one principal during the articles, each principal must complete 6(a). If the articulated clerk(s) will have one principal and secondments, please complete 6(a) and (b).

(a) Areas of practice to be covered and supervised within your firm

(i) Please list:

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(ii) Will you have an organized system of rotation in place? If so, please describe:

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(b) Areas of practice to be covered and supervised on secondment (i.e., each of the other placements):

For **each** proposed secondment, please provide the following details:

(i) Name of secondment lawyer (lawyer at other firm who is otherwise qualified to act as principal):

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(ii) Proposed dates for the secondment:

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- (iii) Practice areas(s) in which articulated clerk(s) will gain experience during secondment:

**Competency Framework**

8. I have reviewed the contents of the Competency Framework and will ensure that the articulated clerk(s) is given the opportunity to learn all of the enumerated skills. I will ensure that any lawyers in the firm who act in a supervisory capacity for the articulated clerk(s) are familiar with the contents of the Competency Framework and understand the importance of adhering to it.

(a) **Practice Skills**

**IMPORTANT:** During the articling term, the articulated clerk(s) must receive practical experience and training in all of the following practice skills; however, it is recognized that the articulated clerk(s) may not cover every skill at each placement. Accordingly, the principal/supervising lawyer should complete the portions of this section as applicable. If a skill will not be covered during a particular placement, please indicate N/A.

The articulated clerk(s) will receive practical experience and training in **all** of the following practice skills:

- (i) Interviewing and advising  
 Give details of the types of individuals the articulated clerk(s) will interview (e.g., clients, witnesses, experts) and the percentage of time the articulated clerk(s) will spend interviewing clients. Explain how the process will work.  
 Will the articulated clerk(s) first observe and eventually interview clients on their own?  
 Will the articulated clerk(s) advise clients?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (ii) Analysis of problems  
Explain how the articulated clerk(s) will develop skills in problem analysis.

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (iii) Fact investigation  
How will the articulated clerk(s) gain these skills?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (iv) Legal research  
What will the articulated clerk(s) be taught about legal research – by whom and when?  
How much of the articulated clerk’s time will be spent doing research and writing memorandums and for whom?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (v) It is anticipated the articulated clerk(s) will spend \_\_\_\_\_ % of their time throughout the year engaged in legal research and reporting. To allow for development of all legal skills, research and reporting should be no more than 40%.

- (vi) Planning and conduct of a matter  
How will the articulated clerk(s) be taught to plan and conduct a matter?  
Will the articulated clerk(s) have an opportunity to plan and conduct a matter on their own?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (vii) Drafting  
How will the articulated clerk(s) be taught this skill?  
What opportunities will the articulated clerk(s) have to practise drafting?  
What will the articulated clerk(s) draft?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

- (viii) Writing  
How will the articulated clerk(s) be taught this skill?  
What opportunities will the articulated clerk(s) have to practise writing?  
What will the articulated clerk(s) write?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

(ix) Negotiation

Give details of the types of negotiations the articulated clerk(s) will be involved in and the percentage of time the articulated clerk(s) will spend negotiating. Explain how the process will work.

Will the articulated clerk(s) first observe and eventually negotiate on their own?

Will the articulated clerk(s) advise clients?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

(x) Advocacy

Explain how the articulated clerk's education in this skill will occur.

What advocacy skills will the articulated clerk(s) be exposed to and which skills will the articulated clerk practise?

What types of trials and other proceedings will the articulated clerk(s) take part in and what will be the role of the articulated clerk(s)?

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

(xi) Feedback

Explain how, and how often, the articulated clerk(s) will receive feedback in the above practice skills. (For example, will feedback be given orally, by way of written comments, immediately, once per day, etc?) Please also consider how feedback will be given for written work, as well as for in-person work.

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation

(b) **Personal Practice and Office Management Skills**

During the articling term, the articulated clerk(s) must be taught personal practice and office management skills; however, it is recognized that these skills may not be covered at each placement. Accordingly, the principal/supervising lawyer should complete the portions of this section as applicable. If skills will not be covered during a particular placement, please indicate N/A.

The articulated clerk(s) will be taught personal practice and office management skills in the following manner:

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In what areas of personal practice and office management will the articulated clerk(s) receive training?

(i) How and in what manner will the articulated clerk(s) be taught to manage their time?

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(ii) How and in what manner will the articulated clerk(s) be taught to manage files?

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(iii) How and in what manner will the articulated clerk(s) be taught about billing and collecting accounts/general accounting?

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(iv) How and in what manner will the articulated clerk(s) be taught about trust accounting?

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(v) How and in what manner will the articulated clerk(s) be taught about client relations?

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(vi) How and in what manner will the articulated clerk(s) be taught about communication with clients, staff and others?

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(vii) How and in what manner will the articulated clerk(s) be taught about delegation?

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(viii) Explain how the articulated clerk(s) will receive feedback in personal practice and office management.

Placement One	Provide Explanation
Placement Two	Provide Explanation
Placement Three, etc.	Provide Explanation



(c) **Ethics and Professional Responsibility Skills**

The articulated clerk(s) must receive practical experience and training in ethics and professional responsibility including the following:

- A lawyer's duties to the courts, clients, the public, other members of the profession and to themselves;
- A lawyer's duty to adhere to the high ethical standards, including demonstrating courtesy and good character in all dealings;
- The ability to recognize circumstances that give rise to ethical problems and to recognize that such problems benefit from prompt and serious attention and guidance from others; and
- A lawyer's obligation to maintain and enhance the reputation of the profession, including acting in a respectful, non-discriminatory manner, protecting all client confidences and discharging all undertakings.

9. **Professional Development**

What professional development will the articulated clerk(s) participate in during the articling term? (For instance, will the articulated clerk(s) attend educational seminars/workshops/conferences, either in-house or externally? Please describe. Who will pay the fees for these seminars, if applicable?)

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10. **Guidance and Advice**

The Society encourages one member of the firm, **other than the principal/supervising lawyer**, to be designated to act as a mentor for the articulated clerk(s). The articulated clerk(s) should be encouraged to approach the mentor to discuss, in confidence, any problems or areas of concern relating to the articulated clerk's articling experience.

The mentor will be: \_\_\_\_\_  
(**other than the principal/supervising lawyer**)

11. **Routine Tasks**

It is recognized that the articulated clerk(s) may perform some routine tasks such as filing of documents in court, making occasional deliveries, assisting with photocopying or other clerical matters, etc. As these tasks do not have a significant educational component, we confirm that such tasks will be performed by the articulated clerk only occasionally, and not more than 10% of the time.

Yes  No

## 12. Administrative Assistant Support

There is administrative assistant support available to the articulated clerk(s):

Placement One	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Placement Two	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Placement Three	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

## 13. Research Aids

(a) The firm has a librarian on staff:

Placement One	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Placement Two	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Placement Three	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

(b) The following research aids are available for the articulated clerk(s) at the firm in paper format:

Law Reports	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Other (please specify): \_\_\_\_\_

(c) What electronic research aids are available for the articulated clerk(s) at the firm? Please specify.

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(d) The following research aids are available for the articulated clerk(s) in our community:

Barristers' Library	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
University library	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Other (please specify): \_\_\_\_\_

## 14. Evaluations

Performance evaluations will take place:

Monthly	<input type="checkbox"/>
Every 2 Months	<input type="checkbox"/>
Every 3 Months	<input type="checkbox"/>
Every 6 Months	<input type="checkbox"/>
End of Rotation	<input type="checkbox"/>

Other (please specify): \_\_\_\_\_

Will performance evaluations occur at each placement? Yes  No

The principal/supervising lawyer undertakes to submit the Mid-term Report to the Society six months after the commencement of the articling term or at such other time as may be required by the Society.

**15. Billable Hours**

Is there an expectation of billable hours during the articling term?    Yes     No

If “yes”, how many billable hours are expected of the articulated clerk(s) during the articling term?

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At which placement(s) does the expectation apply?

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If “yes”, as the primary purpose of the articling year is education, rather than billing, describe the purpose of the billable hours. (For example, is the purpose to teach the articulated clerk(s) to track their hours or for another educational reason, or is it a billable hours target for revenue generating purposes?)

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Dated at \_\_\_\_\_, Nova Scotia, \_\_\_\_\_, 20 \_\_\_\_\_.

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Signature of Principal/Supervising Lawyer