



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 Articled 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 Articled Clerks.

GENERAL

If the shared articles are structured such that the Articled Clerk(s) has more than one 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 Articled Clerk will participate in the supervision, education and evaluation of the Articled Clerk, the Principal/Supervising Lawyer/secondment lawyer has responsibility to ensure proper supervision of the Articled Clerk(s) throughout the placement. Accordingly, the Principal/Supervising Lawyer/Secondment Lawyer should regularly consult with all lawyers with whom the Articled 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 Articled Clerk(s). As a result, the Principal/Supervising Lawyer should also consult with the Secondment Lawyers on the progress of the Articled Clerk(s).

7. If the shared articles are structured such that the Articled Clerk(s) has more than one Principal during the articles, each Principal must complete 6(a). If the Articled 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:

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

(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):

(ii) Proposed dates for the secondment:

- (iii) Practice areas(s) in which Articled Clerk(s) will gain experience during secondment:

Competency Framework

8. I have reviewed the contents of the Competency Framework and will ensure that the Articled 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 Articled 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 Articled Clerk(s) must receive practical experience and training in all of the following practice skills; however, it is recognized that the Articled 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 Articled 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 Articled Clerk(s) will interview (e.g., clients, witnesses, experts) and the percentage of time the Articled Clerk(s) will spend interviewing clients. Explain how the process will work.
 Will the Articled Clerk(s) first observe and eventually interview clients on their own?
 Will the Articled Clerk(s) advise clients?

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

- (ii) Analysis of problems –
Explain how the Articled 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 Articled Clerk(s) gain these skills?

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

- (iv) Legal research –
What will the Articled Clerk(s) be taught about legal research – by whom and when?
How much of the Articled 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 Articled 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 Articled Clerk(s) be taught to plan and conduct a matter?
 Will the Articled 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 (e.g. contracts, pleadings, wills, etc.) –
 How will the Articled Clerk(s) be taught this skill?
 What opportunities will the Articled Clerk(s) have to practise drafting?
 What will the Articled Clerk(s) draft?

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

- (viii) Writing (e.g. correspondence, memos, blogs, etc.) –
How will the Articled Clerk(s) be taught this skill?
What opportunities will the Articled Clerk(s) have to practise writing?
What will the Articled 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 Articled Clerk(s) will be involved in and the percentage of time the Articled Clerk(s) will spend negotiating. Explain how the process will work.
Will the Articled Clerk(s) first observe and eventually negotiate on their own?
Will the Articled Clerk(s) advise clients?

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

- (x) **Advocacy –**
 Explain how the Articled Clerk’s education in this skill will occur.
 What advocacy skills will the Articled Clerk(s) be exposed to and which skills will the Articled Clerk practise?
 What types of trials and other proceedings will the Articled Clerk(s) take part in and what will be the role of the Articled Clerk(s)?

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

- (xi) **Feedback –**
 Explain how, and how often, the Articled 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 Articled 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 Articled Clerk(s) will be taught personal practice and office management skills in the following manner:

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

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

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

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

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

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

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

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

(viii) Explain how the Articled 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 Articled 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 Articled Clerk(s) participate in during the articling term? (For instance, will the Articled Clerk(s) attend educational seminars/workshops/conferences, either in-house or externally? Please describe. Who will pay the fees for these seminars, if applicable?)

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 Articled Clerk(s). The Articled Clerk(s) should be encouraged to approach the mentor to discuss, in confidence, any problems or areas of concern relating to the Articled Clerk's articling experience.

The mentor will be: _____
(**other than the Principal/Supervising Lawyer**)

* The mentor may also be a lawyer outside the firm.

11. **Routine Tasks**

It is recognized that the Articled 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 not be performed by the Articled Clerk **more than 10%** of the time.

Yes No

12. Administrative Assistant Support

There is administrative assistant support available to the Articled 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 Articled 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 Articled Clerk(s) at the firm? Please specify.

(d) The following research aids are available for the Articled 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 Articled Clerk(s) during the articling term?

At which placement(s) does the expectation apply?

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 Articled Clerk(s) to track their hours or for another educational reason, or is it a billable hours’ target for revenue generating purposes?)

Dated at _____, Nova Scotia, _____, 20 _____.

Signature of Principal/Supervising Lawyer