



NOVA SCOTIA BARRISTERS' SOCIETY

EDUCATION PLAN (Principal is Individual)

Prior to developing an Education Plan, principals must review the skills outcomes listed in the [Competency Framework](#). The Education Plan must address all the lawyering skills listed in the Competency Framework.

A principal 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 should be listed. Once a principal'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

1. Principal Name: _____
2. Firm Name: _____
3. Firm Address: _____

4. Number of Practising Lawyers in Firm: _____

Practice Areas and Supervision

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 has responsibility to ensure proper supervision of the articulated clerk throughout the articling term, and will be expected to report to the Executive Director on the articulated clerk's experience and competency. Accordingly, the principal should regularly consult with all lawyers with whom the articulated clerk works during the articling term.

5. (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

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 articulated clerk will gain experience during secondment:

(iv) Purpose of the secondment:
(For example, is the articulated clerk being seconded to gain experience in an area of law not available within your firm, to focus on particular practice or lawyering skills, another reason, etc.)

Competency Framework

6. I have reviewed the contents of the Competency Framework and will ensure that the articulated clerk 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 are familiar with the contents of the Competency Framework and understand the importance of adhering to it.

(a) **Practice Skills**

The articulated clerk at the firm 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 will interview (e.g.: clients, witnesses, experts) and the percentage of time the articulated clerk will spend interviewing clients. Explain how the process will work.
Will the articulated clerk first observe and eventually interview clients on their own?
Will the articulated clerk advise clients?
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- (ii) **Analysis of problems**
Explain how the articulated clerk will develop skills in problem analysis.
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- (iii) **Fact investigation**
How will the articulated clerk gain these skills?
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- (iv) Legal research
What will the articled clerk be taught about legal research – by whom and when?
For whom will the articled clerk do research and memorandum writing?

- (v) We anticipate the articled clerk 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 be taught to plan and conduct a matter?
Will the articled clerk have an opportunity to plan and conduct a matter on their own?

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

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

- (ix) **Negotiation**
Give details of the types of negotiations the articulated clerk will be involved in and the percentage of time the articulated clerk will spend negotiating. Explain how the process will work.
Will the articulated clerk first observe and eventually negotiate on the articulated clerk's own?
Will the articulated clerk advise clients?

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

- (xi) **Feedback**
Explain how, and how often, the articulated clerk 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.

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

- (i) The articulated clerk at the firm will be taught personal practice and office management skills in the following manner:

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

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

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

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

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

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

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

g) How and in what manner will the articled clerk be taught about delegation?

(iii) Explain how the articled clerk will receive feedback in personal practice and office management.

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

(i) The articled clerk at the firm 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.

7. Professional Development

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

8. Guidance and Advice

The Society encourages one member of the firm, **other than the principal**, to be designated to act as a mentor for the articulated clerk. The articulated clerk 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)

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

9. Routine Tasks

It is recognized that the articulated clerk 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

10. Administrative Assistant Support

There is administrative assistant support available to the articulated clerk Yes No

11. Research Aids

(a) The firm has a librarian on staff Yes No

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

Law Reports Yes No

Other (please specify): _____

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

(d) The following research aids are available for the articulated clerk 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): _____

12. 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):	_____

I undertake to submit the Mid-term Report from the principal to the Society six months after the commencement of the articling term or at such other time as may be required by the Society.

13. 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 during the articling term?

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 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