This interim report was approved by the Benchers on December 7, 2001, with a direction to the Admission Program Task Force to develop for further Bencher consideration those options listed in Appendix A

November 26, 2001

Admission Program Task Force

Interim Report

The Law Society of British Columbia

The Law Society of British Columbia
8th Floor, 845 Cambie Street
Vancouver, B.C. V6B 4Z9
Telephone: (604) 669-2533
Fax: (604) 669-5232
TTY: (604) 443-5700
www.lawsociety.bc.ca

INTERIM REPORT OF THE ADMISSION PROGRAM TASK FORCE

1. Introduction: Admission Program reform and enhancement

In November, 1999, Christopher Roper completed a comprehensive review of the Professional Legal Training Course (PLTC), and presented his report, *New Directions for Practical Legal Training in British Columbia*, (the *Roper Report*). The *Roper Report* concludes: "British Columbia has a well-respected and smoothly conducted course of pre-call training, known as the Professional Legal Training Course (PLTC). The course is very successful in achieving what it sets out to do. But now it is time to review it… Quality control begins at the entry gate and so, naturally, the training for those about to enter the profession must be put under scrutiny, regularly and critically…"

The Benchers dedicated their March 30 and 31, 2001 annual retreat to the topic of "Admission Program Reform and Enhancement." Benchers considered the effectiveness of the Admission Program, including both PLTC and articling, and expressed support for initiating a process to renew and enhance the Admission Program. In particular, concerns were voiced about significant disparities in the quality of articling experiences.

Following the retreat, the Benchers set up the Admission Program Task Force to review the Admission Program, including both PLTC and articling, and, where appropriate, to recommend reforms to ensure the Program continues to meet the needs of the profession and to fulfil the Law Society's statutory mandate to serve the public interest.

The Task Force has met six times since May, 2001. Its members are:

Benchers:	Richard Gibbs, Q.C. (Chair), Robert Diebolt, Q.C. and Jane Shackell, Q.C.
Non Benchers:	Hugh Braker, Q.C., Mary Childs, Anne Chopra, William Ehrcke, Q.C., Susan Sangha and Peter Warner, Q.C.
Staff:	James Matkin, Lynn Burns, Michael Lucas, Lesley Small and Alan Treleaven.

The Task Force has reviewed the history of the Admission Program, and the programs in other provinces, countries and professions. It has considered the *Roper Report*, student evaluations of PLTC, the results of surveys of articling principals and students, the results of surveys of the bar as a whole and of newly called lawyers, and the suggestions of the Benchers at the March, 2001 Benchers' retreat. It has also reviewed sample student evaluations of articles and firm evaluations of students, law firm brochures and websites,

statistics relating to claims, complaints and areas of practice, and PLTC pass/fail information. The Task Force has obtained preliminary input from some members of the profession through one-on-one interviews, from the PLTC faculty and from the two B.C. law schools. The Task Force has also considered the potential for on-line learning, having reviewed on-line learning initiatives underway in B.C., other jurisdictions and other professions.

2. Purpose of this Interim Report

This Interim Report is the result of the Task Force collecting, investigating, discussing, and either selecting, for further investigation and discussion, or discarding potential options for an enhanced Admission Program.

The Task Force has developed a series of options for consideration by the Benchers, and now seeks direction from the Benchers as to which options it should further explore and develop in preparing a final report. The options are presented and discussed in section 6 of this Interim Report, and for ease of reference are listed again (without notes or discussion) in Appendix A. At this time, the options presented for consideration by the Task Force in this Report are not recommendations. Further investigation and evaluation are required.

Appendix B lists options that the Task Force proposes not be given further attention. The Benchers may, however, ask the Task Force to consider one or more in preparing a final report.

3. Mobility context

The Admission Program Task Force's deliberations have been concurrent with mobility initiatives that are underway in western Canada and nationally.

a) Western provinces

Accompanying the recent mobility initiatives of the western provinces' law societies, the Western Law Societies' Education Task Force, comprising Bencher representatives and staff from B.C., Alberta, Saskatchewan and Manitoba, has co-operated in preparing a *Competency Profile* (see Appendix C). The *Competency Profile* is a detailed statement of the knowledge, skills and behaviours expected of entry level lawyers, and has been developed as a first important step in potentially harmonizing the four western provinces' admission programs. Because the timeframe within which the Western Law Societies' Education Task Force is to complete its work is not settled, and because its mandate continues to be subject to approval by the four law societies, it is not yet possible to predict the potential extent of this harmonization process. It is expected, however, that this process will

result in a greater commonality and sharing of resources among the western programs.

The Admission Program Task Force has reviewed the *Competency Profile*, and recognizes that it can be an important tool in the reform and enhancement of the Admission Program curriculum.

b) National

At the August 18, 2001 Federation of Law Societies meeting, law societies unanimously passed a resolution setting up the new Federation Mobility Task Force, chaired by Law Society of Upper Canada Treasurer Vern Krishna, Q.C. The resolution includes possible consideration of the bar admission process. The Federation Task Force is at an early stage in its work, and is planning to submit a series of preliminary proposals for discussion at the next Federation meeting on March 2, 2002.

The Admission Program Task Force, recognizing the importance of maximizing the effectiveness of the Admission Program, decided to carry on with its work without waiting for any concrete developments that may emerge from either the ongoing work of the four western provinces' law societies or the Federation Mobility Task Force. To the extent that the Law Society might eventually decide to harmonize the Admission Program with other western law societies or nationally, further Admission Program changes may be contemplated at that time.

4. Admission Program objectives

The Task Force recognizes that the mandate of the Admission Program ought to be to ensure that every student admitted to the bar of B.C. is competent and fit to begin the practice of law. Therefore, a student, to successfully complete the Admission Program, must demonstrate competence to begin the practice of law, measured against a Law Society approved statement of lawyering competencies, such as the *Competency Profile*.

The Task Force endorses the conclusion in the *Roper Report* that the profession needs to be satisfied that newly called lawyers possess:

- sufficient legal knowledge,
- sufficient lawyering and law practice skills and professional attitude,
- sufficient actual experience of the practice of law, and
- good character.

5. A threshold question

The Task Force considered whether the Law Society ought to discontinue either or both of the bar admission teaching and articling terms, and simply require the passing of self-study bar examinations and perhaps skills assessments.

Such a significant change would replicate the bar admission process in the United States. The Task Force is not aware of any empirical evidence that would support a comparison of standards of competence for newly called lawyers in B.C. and in the U.S. However, the Task Force observes that a 1992 American Bar Association report, *Legal Education and Professional Development*, commonly referred to as the *MacCrate Report*, recommends measures to eliminate the competence gap between U.S. law school graduation and admission to the bar, and acknowledges the superiority of Commonwealth admission programs, including Canada's.

The Benchers also heard, at the March, 2001 retreat, that in the U.S. the private sector markets bar examination preparation cram courses, with the sole objective of enabling students to obtain passing grades on bar examinations. This objective is considerably different than that of an effective Admission Program, which is to prepare students to practise law competently.

The Task Force has concluded that it supports an effective Admission Program, including both a teaching and articling component, as a prerequisite to admission to the bar. Advantages of an effective Admission Program include:

- filling the competence gap that otherwise exists between law school graduation and admission to the bar, by providing supervised practical experience with actual clients;

- teaching the "how-to" of the practice of law, including practical application of substantive law, procedure, skills, professional responsibility, loss prevention and office management;

- socializing students to their role in the profession and responsibility to the public, the profession and the administration of justice;

- assisting and preparing those students who will either be in sole practice or otherwise largely unsupervised; and

- mitigating, through teaching and mentoring, disadvantages faced by students from groups under-represented in the profession. *(In the U.S., there is a significant disparity in the success rate of students from some minority groups in qualifying for admission to the bar.)*

The Task Force has considered potential disadvantages in continuing with an Admission Program, including both its teaching and articling components:

- the Program imposes a lengthier process on students than would be the case if there were only self-study bar examinations and skills assessments;

- the Program, and particularly the articling term, may not be seen as necessary by some students who have summer law firm experience or who are employed after admission to the bar in law firms with structured education and mentoring programs; and

- the operation of the Program is an expense for Law Society members.

6. Options for further consideration

The Admission Program currently comprises two distinct stages, the 10-week teaching term (PLTC, including the two-part Qualification Examination and four Skills Assessments), and the nine-month articling term. The Task Force sees considerable potential for enrichment of the Admission Program by linking and harmonizing the content of the PLTC term and articling term. This view is supported by the *Roper Report*: "… I suggest that the one year period from graduation to Call be seen as a whole; as an integrated time of professional preparation, with its own objectives and components. I also suggest that the proposed content of PLTC … be, in fact and with some slight adaptation, the prescribed content of the articling year itself."

Therefore, although the following options are presented separately as articling term and PLTC term options, there is a consistent theme throughout that both terms ought to be linked closely to form a comprehensive Admission Program.

a) Articling term options

The Task Force adopts the concerns heard at the Benchers' March, 2001 retreat that the articling term is the weak link in the professional legal education process. Articling has functioned in isolation, and the quality of experience provided to some students has fallen far behind PLTC as preparation for the competent practice of law. The articling term is the one part of the pre-call education and qualification process, from the first day of law school to call to the bar, dedicated to assisting students to acquire, in a real life context, the competence to practise law. As such, it is analogous to the teaching hospital experience for medical students, but too often can fall far short. The 1997 and 2001 surveys of articling principals and students, supplemented by recent interviews, confirm that the most significant shortcomings of the articling term include:

- inconsistent quality in articling experiences,

- inconsistent supervision and feedback,

- inconsistent instruction about professional values and attitudes, and

- powerlessness of students to ensure they receive a satisfactory quality of articles.

The Law Society's approach to the articling term has been largely hands-off. Although the Law Society provides modest guidelines to articling principals and students about what should happen in the articling term, the Law Society largely ignores whether these guidelines are met. The Law Society requires articling principals to be in good standing with four years of practice experience, but does not involve itself in determining whether articling principals are able to provide a reasonable quality of training, and does not meaningfully support such quality.

The need for improvement is underscored in the April, 2000 *Report of the Aboriginal Law Graduates Working Group*, which recommends that the Law Society assume a more active role in the articling process.

The Task Force proposes that it explore further the following articling term options:

#1 Raise the criteria for eligibility to serve as an articling principal (e.g. increase the required minimum years of practice from four to five or more years, and/or disentitle some principals from having students, based on practice history).

(Law Society statistics indicate that an increase to five years would have little or no impact on the number of articling positions available in the province.)

#2 Require articling principals and students to agree to a comprehensive, detailed articling educational contract (including an educational plan), to be approved by the Law Society before an articling placement is approved. The principal and student would then file a mid-term and final compliance/progress report.

(Alberta, Manitoba, Ontario, Quebec and Newfoundland have adopted this system to bolster the awareness of students and articling principals that the articling term is to be a significant educational experience, and to provide some means of monitoring the quality of each articling placement.)

#3 Require students to complete one or more assignments during the articling term, to be submitted for review and timely, confidential feedback from PLTC faculty, perhaps on-line, such as:

- **a writing assignment,** *(as in Newfoundland)*
- **a drafting assignment,** *(as in Newfoundland)*
- **a professional responsibility assignment with the articling principal,** *(as in Ontario)* **or**
- **a student articling journal** *(as in the College of Law program in New South Wales until 2000),* **including a description and analysis of the student's conduct of (and perhaps principal's critique of) one or more of the following:**
    - **a negotiation**

- **a mediation**
- **a client interview.**

#4 Require articling principals and students to complete a checklist of some mandatory and some optional skills and practice areas in which the student has received practice experience. *(as in the College of Law program in New South Wales and in some Canadian provinces)*

#5 Require articling principals to certify or evaluate student competence (e.g. with a simple Yes/No or a more detailed assessment of the student's competence). *(as in Quebec)*

#6 Provide optional support for articling principals and students, including one or more of:

- **coaching/mentoring by PLTC faculty (support for students in dealing with problems or concerns in the articling term, or for specific advice in performing articling tasks),**
- **a video,**
- **an articling manual,**
- **an articling principal handbook, or**
- **an articling principal/student collegial annual event.**

#7 Enhance the optional services of an Articling Ombudsperson for problems in the articling term, including those related to discrimination and harassment.

(The Task Force has identified the importance of carefully considering the role of an Articling Ombudsperson, so that while students would be supported during the articling term, articling principals and PLTC faculty would not be hampered in their ability to supervise, train and evaluate articling students effectively.)

#8 Provide or encourage a voluntary Inns of Court/mentoring type of program throughout B.C.

(Local bars might be best equipped to provide these programs, with support of the Law Society in providing ideas, templates and materials. The Roper Report suggests a Professional Triennium: "A period of about three years … of structured training opportunities, beginning in articles and continuing on past Call into practice.")

#9 Shorten the articling term (e.g. from the current nine months, to six or eight months) while lengthening the PLTC term (e.g. from 10 to 12 weeks).

(The articling term is six months in Quebec, and 15 weeks in some Australian states, while their bar admission teaching terms are longer than in B.C.)

#10 Whether or not the articling term is shortened, impose restrictions during the initial year(s) of practice (e.g. required mentoring, CLE courses, limits on practice, prerequisites to setting up as a sole practitioner or small partnership, such as a management course, years of practice requirement or a management pretest).

(New Zealand does not have an articling term, but requires three years of post admission experience for solicitors before they can practise on their own or as a partner. Hong Kong has a two-year articling term, followed by two years of limited practice for solicitors, with mandatory CLE during the two-year articling term and the first year of limited practice.)

b) Teaching term options (PLTC)

The Task Force proposes that it further explore the following options for the Admission Program's PLTC term:

#1 Continue the basic character of the PLTC term, including 10 weeks, in-person delivery, full-time faculty with practitioner guests, skills emphasis, and workshop rather than lecture format.

#2 Revise and adjust the curriculum to correspond to the Competency Profile developed in cooperation with the three other western provinces.

#3 Use on-line technology *(as the Roper Report recommends)* **to:**

- **integrate the articling term with the PLTC term, including the PLTC faculty role as coach/mentor and provider of feedback on articling assignments, as described in articling term options #3 and #6 (pages 6 and 7, above),**
- **improve access to materials, registration, information, etc., and**
- **supplement legal research, writing and drafting skills work.**

#4 Adhere more strictly to the Law Society policy limiting the number of subsequent attempts permitted to failed students.

#5 Introduce a system of mandatory plus some elective components. *(as in England and Wales, and some Australian states, and recommended by the Roper Report)*

#6 Increase skills work, and further decrease the substantive law teaching component. (*as in Nova Scotia)*

#7 Lengthen the PLTC term (e.g. to 12 weeks) and shorten the articling term accordingly, as described in articling term option #9 (page 7, above).

#8 Institute a pre-test to allow for exemption from part(s) of the PLTC term for:

a) foreign trained lawyers,

(Foreign trained lawyers not already called in a Canadian province or territory who have practised for a sufficient time in another country may, after completing the National Committee on Accreditation process, qualify for a partial reduction of the articling term but not PLTC. However, B.C. lawyers may practise in some Commonwealth countries and U.S. states by simply passing local bar examinations.)

b) all students.

(This is currently done only for the Legal Research assignment in PLTC. Extending it raises a concern of possible pressure by law firms for students to be totally or partially exempted from the PLTC term, and may lead to the PLTC term becoming only a remedial program.)

#9 Reconsider an entrance examination to qualify for entry to the Admission Program.

(The Task Force recognizes the controversy this suggestion caused previously and the importance of extensive consultation. Currently, New Brunswick and Nova Scotia have examinations that most students opt to write before the Bar Admission Course. Failure of these examinations does not prevent admission to the course or articling. Because the examinations precede instruction on skills, practice, procedure, ethics and office management, they are set at a law school level, testing basic law concepts and issue identification.)

7. Conclusion

The Task Force has concluded that there ought to be a clearly articulated process prescribed for continuous review and enhancement of the Admission Program in the future. As the practice of law changes, together with the needs and demands of clients and the forces of the marketplace, it is important that the Admission Program not only be prepared to meet the changes, but be out in front of them.

Accordingly, the Task Force anticipates including the following in its final report:

> The Admission Program should be subject to systematic, continuous review and enhancement, including:

- a process for regular review and evaluation of the Program, including surveys of students, newly called lawyers and articling principals, to ensure it continues to meet the needs of the profession and the public,

- a process for regular review of the prescribed lawyering competencies, to account for changes in the practice of law,

- a systematic, ongoing updating and enhancement of the Program to ensure it meets the continuous changes in the law and practice, and

- a systematic attention to new learning and practice technologies.

The Task Force, in preparing its final report, intends to consult with the profession, students, law schools and interested legal organizations. Effective consultation will be essential in preparing soundly based recommendations.

The Task Force's final report should include budgetary information for its recommended options, together with a proposed plan for strategic implementation. Some changes could be introduced initially as a pilot project, through volunteer segments of the profession and the student population. Most of these options would require refinement, further input and investigation. Those options that are ultimately adopted would then lead to careful design, and may best be phased in over time. Where applicable, new administrative mechanisms would be put in place, and standards and an appeal process devised and implemented. Rule changes may be required.

While the Task Force considers it premature to recommend specifically any of the options in section 6 above, it does request direction from the Benchers as to which options to investigate further.

APPENDIX A

Options for further consideration by the Admission Program Task Force

Articling term

#1 Raise the criteria for eligibility to serve as an articling principal (e.g. increase the required minimum years of practice from four to five or more years, and/or disentitle some principals from having students, based on practice history).

#2 Require articling principals and students to agree to a comprehensive, detailed articling educational contract (including an educational plan), to be approved by the Law Society before an articling placement is approved. The principal and student would then file a mid-term and final compliance/progress report.

#3 Require articling students to complete one or more assignments during the articling term, to be submitted for review and timely, confidential feedback from PLTC faculty, perhaps on-line, such as:

- a writing assignment,
- a drafting assignment,
- a professional responsibility assignment with the articling principal, or
- an articling journal, including a description and analysis of the student's conduct of (and perhaps principal's critique of) one or more of the following:
    - a negotiation
    - a mediation
    - a client interview.

#4 Require articling principals and students to complete a checklist of some mandatory and some optional skills and practice areas in which the student has received practice experience.

#5 Require articling principals to certify or evaluate student competence (e.g. by a simple Yes/No or a more detailed assessment of student competence).

#6 Provide optional support for articling principals and students, including one or more of:

- coaching/mentoring by PLTC faculty (support for students in dealing with problems or concerns in the articling term, or for specific advice in performing articling tasks),
- a video,
- an articling manual,
- an articling principal handbook, or
- an articling principal/student collegial annual event.

#7 Enhance the optional services of an Articling Ombudsperson for problems in the articling term, including those related to discrimination and harassment.

#8 Provide or encourage a voluntary Inns of Court/mentoring type of program throughout B.C.

#9 Shorten the articling term (e.g. from the current nine months, to six or eight months) while increasing the length of the PLTC term (e.g. from 10 to 12 weeks).

#10 Whether or not articling is shortened, impose restrictions during the initial year(s) of practice (e.g. required mentoring, CLE courses, limits on practice, prerequisites to setting up as a sole practitioner or small partnership, such as a management course, years of practice requirement or a management pretest).

Teaching term (PLTC)

#1 Continue the basic character of the PLTC term, including 10 weeks, in-person delivery, full-time faculty with practitioner guests, skills emphasis, and workshop rather than lecture format.

#2 Revise and adjust the curriculum to correspond to the Competency Profile developed in cooperation with the three other western provinces.

#3 Use on-line technology to:

- integrate the articling term with the PLTC term, including the PLTC faculty role as coach/mentor and provider of feedback on articling assignments, as described in articling term options #3 and #6 (above),
- improve access to materials, registration, information, etc., and
- supplement legal research, writing and drafting skills work.

#4 Adhere more strictly to the Law Society policy limiting the number of subsequent attempts permitted to failed students.

#5 Introduce a system of mandatory plus some elective components.

#6 Increase skills work, and further decrease the substantive law teaching component.

#7 Lengthen the PLTC term (e.g. to 12 weeks) and shorten the articling term accordingly, as described in articling term option #9 (above).

#8 Institute a pre-test to allow for exemption from part(s) of the PLTC term for:

a) foreign trained lawyers,

b) all students.

#9 Reconsider an entrance examination to qualify for entry to the Admission Program.

APPENDIX B

Options not to be pursued further

Articling term

#1 Eliminate the articling term. *(This would be consistent with the U.S.)*

#2 Replace the articling term with a substantially longer practical experience component. *(The Law Society of England and Wales mandates a two-year pre-call training contract for solicitors.)*

#3 Replace the articling term with a considerably expanded course and/or expanded testing. *(This is the situation in some Australian states. In the U.S., there are no articling requirements, although 40 states have mandatory CLE.)*

#4 Maintain the existing, largely hands-off approach to the articling term.

#5 Encourage law schools to establish alternative cooperative programs, alternating the academic and workplace terms. *(The Queen's cooperative program is four years in length, and satisfies the Ontario articling requirement.)*

#6 Implement a mandatory coaching program for articling principals on how to provide effective student supervision.

#7 Implement a mandatory Inns of Court style program.

#8 Provide some credit toward the articling term requirement for law school student temporary summer articles. *(as in Newfoundland)*

Teaching term (PLTC)

#1 Eliminate the PLTC term and replace it with examinations and skills assessments. *(This would be consistent with the U.S.)*

#2 Substantially lengthen the PLTC term. *(Ontario has 18 weeks.)*

#3 Raise the passing score on Skills Assessments and the Qualification Examination.

#4 Develop an on-line program to substantially replace classroom learning. *(This is a feature of the CA School of Business in western Canada, and one stream offered by the Colleges of Law in New South Wales and the U.K. It is being considered by some jurisdictions to overcome shortcomings in volunteer-delivered programs and significant geographic barriers.)*

#5 Divide PLTC into two or more terms, held at different times during articling term. *(as in Alberta, Saskatchewan, Manitoba, New Brunswick)*

#6 Add a professional year to law school for those wishing to practise law. *(as in Hong Kong)*

#7 License other providers, and a possible variety of programs. *(as in England and Wales, and in New South Wales)*

APPENDIX C

Competency profile

Note: This competency profile was adopted by the Benchers on December 7, 2001, and includes the amendments to the draft made by the Benchers at that time.

This competency profile outlines the knowledge, skills and behaviours expected of entry-level lawyers.

A newly called lawyer must demonstrate competency in the following four areas:

1. Lawyering skills;
2. Practice and management skills;
3. Ethics and professionalism;
4. Legal knowledge.

1. Lawyering skills

A newly called lawyer shall have and maintain the following lawyering skills:

(i) Problem-solving

A newly called lawyer must:

- identify relevant facts
- identify legal, practical and client issues and conduct the necessary research arising from those issues
- ascertain the client's goals and objectives
- analyze the results of research
- apply the law to the facts
- form an opinion as to the client's legal entitlements
- identify and assess possible remedies
- develop and implement a plan of action

(ii) Legal research

A newly called lawyer must:

- identify the question(s) of law
- select sources and methods and conduct research
- select sources and methods and conduct search(es)

- analyze and apply guiding principles of case law
- analyze and apply statutes
- identify, interpret and apply results of research
- effectively communicate the results of research

(iii) Writing

A newly called lawyer must:

- clearly identify the purpose of the proposed communication
- use correct grammar and spelling and use language suitable to the comprehension of the reader and the purpose of the communication
- present the subject of the communication, advice or submissions in a logical, organized, clear and succinct manner
- be persuasive where appropriate
- be accurate and well-reasoned in legal content and analysis
- communicate with civility

(iv) Drafting

A newly called lawyer must:

- identify the purpose of the document
- effectively organize the document
- be able to draft an original transactional document without a precedent
- use precedents appropriately
- use clear language appropriate to the document
- draft a legally effective and enforceable document
- understand and be able to explain a legal document
- identify and implement all necessary steps to enforce a legal document

(v) Interviewing and advising

A newly called lawyer must:

- determine the client's goals, objectives and legal entitlements
- use appropriate questioning techniques to ensure the interview is thorough, effective and efficient
- be understood by the interviewee
- manage client expectations
- establish and maintain rapport and an open communication relationship with the client
- clarify instructions and retainers
- explain and assess possible courses of action with the client
- document the interview

(vi) Advocacy and dispute resolution

A newly called lawyer must:

- represent the client effectively in trial or hearing
- effectively prepare, present and test evidence
- represent the client effectively at a mediation
- negotiate effectively on behalf of a client
- advocate effectively on behalf of a client
- know and observe procedures and etiquette of the forum

2. Practice and management skills

A newly called lawyer shall have and maintain the following practice and management skills:

(i) Personal practice management

A newly called lawyer must implement effective practices, procedures or systems for:

- time management
- project management
- diaries/limitation reminders
- timely and ongoing client communications
- client development
- risk avoidance
- technological proficiency
- balancing professional life with personal life
- effectively managing documents

(ii) Office management

A newly called lawyer must understand and be able to implement effective practices, procedures or systems for:

- quality control
- billing and collection
- trust and general accounting
- file and precedent organization
- avoiding conflicts of interest
- diaries/limitation reminders
- record-keeping/archiving/file destruction

3. Ethics and professionalism

A newly called lawyer shall:

(i) with respect to professionalism:

- demonstrate professional courtesy and good character in all dealings
- maintain and enhance the reputation of the profession
- recognize an obligation to pursue professional development to maintain and enhance legal knowledge and skills
- act in a respectful, non-discriminatory manner
- recognize the limitations on one's abilities to handle a matter and seek help where appropriate
- recognize the importance of public service

(ii) with respect to ethics:

- recognize circumstances that give rise to ethical problems or conflicts
- recognize and discharge all duties and undertakings
- protect confidences
- know and apply professional ethical standards

4. Legal knowledge

A newly called lawyer shall have a general knowledge of the substantive law and current practice and procedures of the areas of law that are likely to be encountered in the early years of a general practice.