



2001 Articling Survey Results

by Adam Whitcombe, Chief Information Officer

Executive Summary

In September 2001, the Bar Admission Task Force conducted a survey of British Columbia principals and students. The survey was delivered by mail to all members of the Law Society who were called between January 1, 2000 and September 2001 or who acted as a principal to one of these members. In total, we distributed 468 questionnaires to principals and received 106 responses (a response rate of 22%). We distributed 498 questionnaires to students and received 150 responses (a response rate of 30%).

The most striking result from the survey was the very different responses given by students and principals. Even on relatively objective questions, the difference was often remarkable. For example, 33% of the students said that they spent 0 – 2 hours per week with their principal, while only 11% of the principals indicated that they spent this much time with their students.

More than two-thirds of the students indicated that they rotated between departments and most had exposure to the principal areas of law that form the basis for newly-called lawyers' practices.

In terms of the importance and frequency of learning various skills, knowledge and attitudes during articles, there is a fairly good relationship between the perceived importance and extent to which the skills, knowledge and attitudes are learned. Principals and students agreed that problem-solving/judgment was the most important skill and generally agreed that knowledge of ethical obligations and legal analysis/reasoning were in the top five. However, the question of whether the respondents' perceived importance of the various skills, knowledge and attitudes is consistent with Law Society's expectations is worth considering. Whether or not learning about operating a law office, trust accounting and financial management should be the least important and least learned skills during articles is a matter that could be considered by the Bar Admission Program Task Force.

As with skills, knowledge and attitudes, principals and students tended to match the frequency of various legal activities with their perception of the relative importance. Students and principals agreed that assisting with court preparation was the most important activity.

Principals and students also generally agreed on importance of a number of other activities, such as writing legal opinions, attending in court with a lawyer and drafting civil litigation documents. However, this does not necessarily mean that the relationship is appropriate. Whether students should engage in very little drafting and a lot of court preparation is a matter that could be considered by the Bar Admission Program Task Force.

Students and principals had different views of the frequency and quality of supervision and evaluation during articles. While 56% of the principals said that they often supervised and provided feedback to their students, only 34% of the students agreed. Similarly, 45% of the students said that their principal provided no formal evaluation or performance reviews compared with the 37% of principals who said that they provided three or more. This difference in perception manifested itself in 23% of the students describing the quality of supervision they received as unsatisfactory.

In terms of ethical education, 56% of the principals indicated that they often provided their students with an opportunity to discuss ethical obligations while only 31% of the students agreed. Given the perceived importance of a knowledge of ethical obligations by both students and principals and the extent to which students felt they learned about these obligations during articles, there might be an opportunity to improve articles by defining the extent of ethical education that the Law Society expects principals to provide and students to learn.

When students and principals were asked whether articling needed improvement, 67% of the principals and 91% of the students said somewhat or very much. While not everyone agreed on the need for improvement, a significant majority of respondents, both principals and students, agreed that some improvement was in order.

Overall, the results of the survey suggest that there is a perceived need for improvement in the articling program and that the Law Society could do more to define what is expected of both principals and students during articles. In particular, the Law Society might identify the skills, knowledge and attitudes it considers important and define the activities that it expects students will experience during articles. The Law Society might also consider establishing standards for supervision and evaluation by the principal.

Introduction

This paper reports on a survey of lawyers who were recently articling students or principals. The survey was conducted at the request of the Bar Admission Program Task Force to assist in evaluating the scope of learning during articles and to determine if there were opportunities for improvement.

The survey questionnaire originated with the extensive work Maureen Fitzgerald conducted for the Credentials Committee in 1997. The questionnaire used for this survey is virtually identical to that developed by Ms. Fitzgerald in 1997 and without her earlier work, this survey would not have been possible. The results of the earlier survey were reported to the Credentials Committee, the Benchers and published to the profession in the March, 2001 edition of the Advocate.

The balance of this paper reports on the most recent results and compares them with the earlier results.

The Survey

The survey consisted of two questionnaires: one for articling students and one for principals. The content of the two questionnaires was identical although the questions were rephrased to make them appropriate for each group. Copies of the questionnaires for each group with the results for each question can be found in Appendices A and B.

The survey was delivered by mail to all members of the Law Society who were called between January 1, 2000 and September 2001 or who acted as a principal to one of these members. In total, we distributed 468 questionnaires to principals and received 106 responses (a response rate of 22%). We distributed 498 questionnaires to students and received 150 responses (a response rate of 30%).

Survey Results

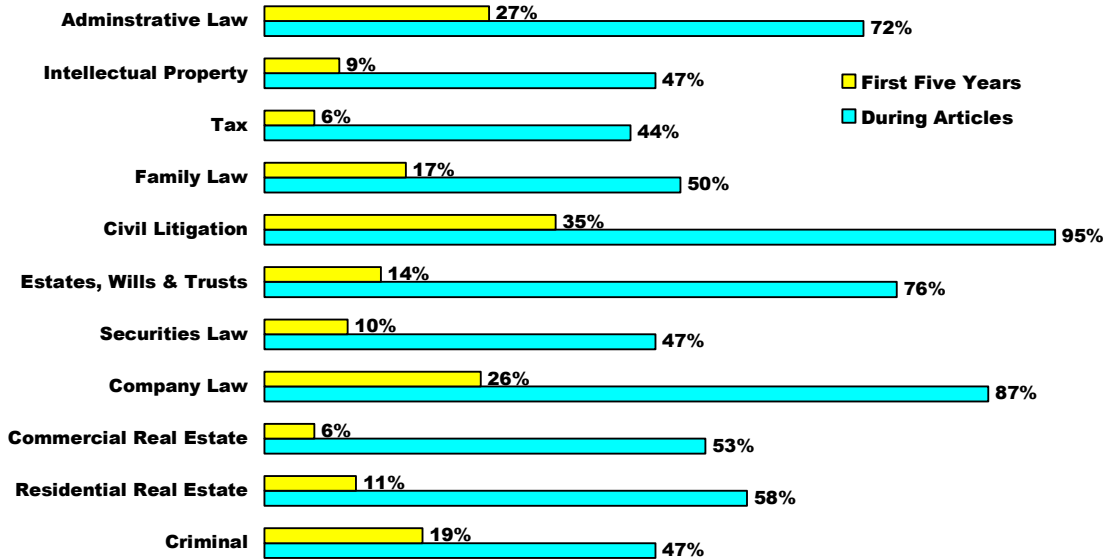
As with the earlier articling survey, the most striking result from the 2001 survey was the very different responses given by students and principals. Even on relatively objective questions, the difference was often remarkable. For example, 33% of the students said that they spent 0 – 2 hours per week with their principal, while only 11% of the principals indicated that they spent this little time with their students.

The differences are most notable when the responses concern the performance of the principal or firm in preparing the articling student. For example, there was no significant difference between the student and principal responses to the importance of learning fact investigation during articles but there is a significant difference in their response to the extent to which it was learned.

This difference between students' and principals' perception of common experiences raises issues for reporting on the results of the survey. Throughout this paper, where there are significant differences between the principals' and students' responses, I will report both sets of responses.

The extent to which students are exposed to different practice areas

During the first five years of private practice, newly called lawyers practice more civil litigation and less corporate/commercial law than their more experienced colleagues. The following chart shows the percentage of lawyers with 1 – 5 years of call who indicated that they practice in various areas of law on the 2001 Annual Practice Declaration and compares this with the percentage of students who indicated that they were exposed to those areas of law somewhat or very much during articles.



As the chart shows, in every case the percentage of students who had some exposure to the various areas of law far exceeds the percentage of recent lawyers who practice in those areas. Compared with the results of the 1997 survey, students were less likely to have been exposed to intellectual property or securities law in 1997 than today and more likely to have been exposed to residential real estate and criminal law in 1997 than today.

More than two-thirds of the students indicated that they rotated between departments, exactly the same percentage as on the 1997 survey. On average they spent about one-third of their time in civil litigation and another quarter of their time in corporate/company law. The remainder was fairly evenly divided between family, criminal, real estate and wills & estates.

While some recent lawyers may practice in areas of law where they had no exposure or experience during articles, the survey results suggest that this is not likely to happen often.

Learning During Articles

We assumed that during articles students have the opportunity to learn a variety of skills, knowledge and attitudes. To test this assumption, both principals and students were asked to assess the *importance* of learning and the *extent* to which students learned certain skills, knowledge, and attitudes during articles.

Importance of Skills, Knowledge and Attitudes

Principals and students agreed to some extent on the most important knowledge, skills and attitudes but not all. The following table shows the top ten skills, knowledge and attitudes identified by the students and compares how they were ranked by the principals (based on average score)

Importance of Learning: Top 10	Ranking	
	Students	Principals
Problem solving/judgment	1	1
Knowledge of ethical obligations	2	4
Knowledge of file management	3	9
Legal analysis/reasoning	4	2
Procedural law	5	8
Fact investigation/analysis	6	3
Legal drafting	7	5
Client management	8	16
Advocating	9	12
Legal writing	10	7

Principals and students agreed that problem-solving/judgment was the most important skill and generally agreed that knowledge of ethical obligations and legal analysis/reasoning were in the top five. However, students placed much more weight on knowledge of file management and client management than did principals. Principals placed more weight on positive personal attributes and knowledge of the Handbook than did students.

At the other end of the range of importance, both principals and students ranked learning about operating a law office, financial management and trust accounting in the bottom five.

Extent of Skills, Knowledge and Attitudes Are Learned

There was more agreement between principals and students over the relative extent to which the students did learn the various skills, knowledge and attitudes during articling. The following table shows the top ten skills, knowledge and attitudes identified by the students and shows how they were ranked by the principals (based on average score)

Extent of Learning: Top 10	Ranking	
	Students	Principals
Legal Research	1	1
Substantive Law	2	8
Legal analysis/reasoning	3	2
Procedural law	4	6
Problem-solving/judgment	5	5
Legal writing	6	7
Fact investigation/analysis	7	3
Legal drafting	8	9
Knowledge of ethics	9	4
Legal process	10	11

As with the question of importance, both the students and principals agreed that the skill of legal research was learned to a considerable extent during articles. Students and principals also agreed that learning substantive law and problem-solving/judgment were in the top five in terms of extent.

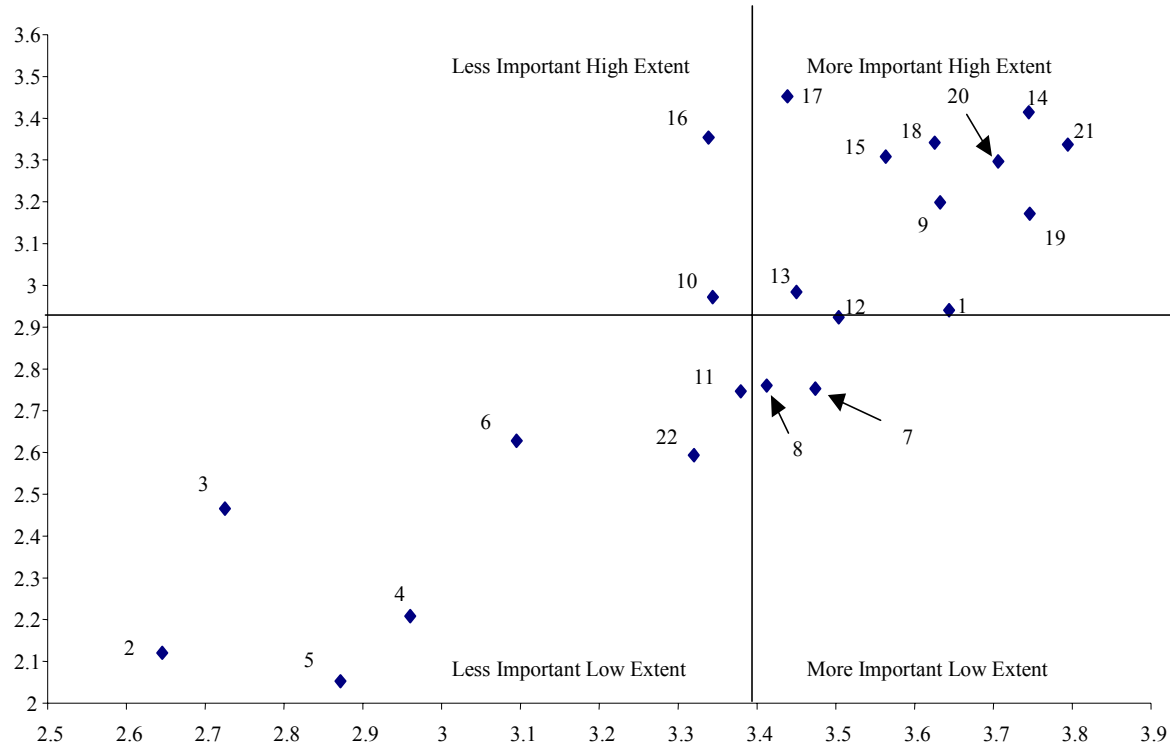
With the exception of learning positive personal attributes, students and principals agreed on the extent the top ten skills; knowledge and attitudes were learned, although not on the relative order.

At the other end of the range of extent, students and principals also agreed on the extent to which operating a law office, financial management and trust accounting were learned, with an average rating of little for all three.

Importance Relative to Extent

Combining the importance of learning the skills, knowledge and attitudes with the extent to which they were learned reveals several opportunities for improvement in the articling process.

The following chart shows the relative position of the 22 skills, knowledge and attitudes covered in the questionnaire.



1	Law office management	9	Legal drafting	17	Legal research
2	Operating a law office	10	Legal process	18	Procedural law
3	Legal theory/jurisprudence	11	Interviewing/counselling	19	Analysis/reasoning
4	Knowledge trust accounting	12	Advocating	20	Fact investigation/analysis
5	Financial management	13	Positive personal attributes	21	Problem solving/judgment
6	Knowledge of Law Society	14	Knowledge of ethics	22	Issue determination
7	Client management	15	Legal writing		
8	Knowledge of Handbook	16	Substantive law		

The chart is divided into quadrants based on the median value for importance and extent. In terms of extent, legal research was the skill that was learned the most during articling and learning this skill was given some importance. In terms of importance, both client management and knowledge of the Handbook were learned less than their relative importance would suggest was appropriate. Both substantive law and legal process were learned to a greater extent than their perceived importance.

Overall, as the chart shows, there is a fairly good relationship between the perceived importance and extent to which the skills, knowledge and attitudes are learned. However, the question of whether the respondents' perceived importance of the various skills, knowledge and attitudes is consistent with Law Society's expectations is worth considering. Whether or not learning about operating a law office, trust accounting and financial management should be the least important and least learned skills during articles is a matter that could be considered by the Bar Admission Program Task Force.

Activities During Articles

We assumed that during articles students have the opportunity to engage in a variety of activities. To test this assumption, both principals and students were asked to assess the *importance* of a number of activities and the *extent* to which students engaged in these activities during articles.

Importance of Activities

Principals and students agreed to some extent on most of the important activities but not all. The following table shows the top ten skills, knowledge and attitudes identified by the students and shows how they were ranked by the principals (based on average score)

Importance of Activities: Top 10	Ranking	
	Students	Principals
Assisting with court preparation	1	1
Attending in court with a lawyer	2	5
Attending on motions with a lawyer	3	4
Interviewing and counselling clients	4	7
Writing legal opinions	5	3
Completing an entire transaction	6	15
Drafting civil litigation documents	7	6
Drafting contracts	8	12
Appearing on motions alone	9	8
Attending small claims or criminal court	10	11

As the table shows, students and principals agreed that assisting with court preparation was the most important activity. Principals and students also agreed on a number of the top ten activities, such as writing legal opinions, attending in court with a lawyer and drafting civil litigation documents. However, the second most important activity according to the principals (conducting research and writing memos) was ranked 12th by the students and completing an entire transaction was ranked 15th by the principals and 6th by the students.

The perceived importance of the activities by both students and principals reflects a strong bias for valuing litigation activities over solicitor's activities. The activities ranked 20th through 25th by both students and principals were all characteristic of a solicitor's practice: e.g. drafting corporate, real estate, wills, security and family law documents and agreements. While civil and criminal litigation is the majority of legal services provided by lawyers, solicitors practice represents about 37% of total practice in the province. Moreover, solicitors' practice accounts for 73% of all amounts paid by the Lawyers Insurance Fund. While most of these claims do not involve newly-called lawyers, it may be that the emphasis

on litigation during articles is detrimental to the proper training in solicitors' practice that manifests itself later in practice.

Frequency of Activities

There was more agreement between principals and students over the relative frequency that students engaged in various activities during articling. The following table shows the top ten skills, knowledge and attitudes identified by the students and shows how they were ranked by the principals (based on average score)

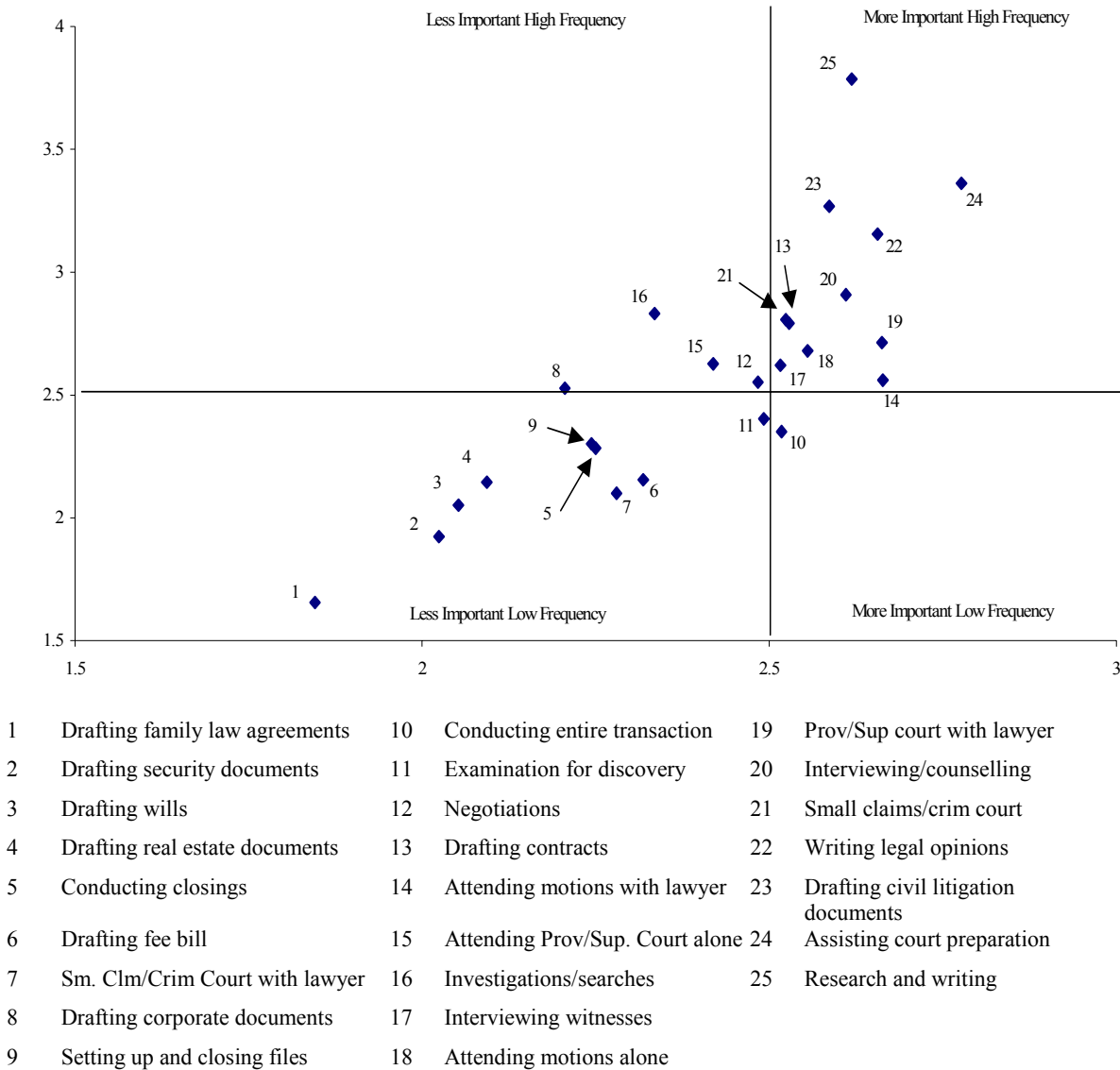
Frequency of Activities: Top 10	Ranking	
	Students	Principals
Conducting research and writing memos	1	1
Assisting with court preparation	2	2
Drafting civil litigation documents	3	4
Writing legal opinions	4	3
Interviewing and counselling clients	5	6
Conducting investigations/searches	6	11
Appearing alone in small claims and criminal courts	7	9
Drafting contracts	8	10
Appearing alone on motions	9	12
Appearing in provincial or supreme court alone	10	13

As the table shows, there was significant agreement between students and principals on the frequency that students engaged in the top six activities. However, principals perceived that students engaged in appearing in court with a lawyer, both on motions and in litigation and interviewed witnesses significantly more often than the students themselves thought. On the other hand, students thought that they appeared in court on their own far more than the principals perceived.

At the other end of the scale, principals and students agreed that drafting wills, family law agreements and security documents were the activities engaged in least by students.

Importance Relative to Frequency

Combining the importance of learning the skills, knowledge and attitudes with the extent to which they were learned reveals several opportunities for improvement in the articling process.



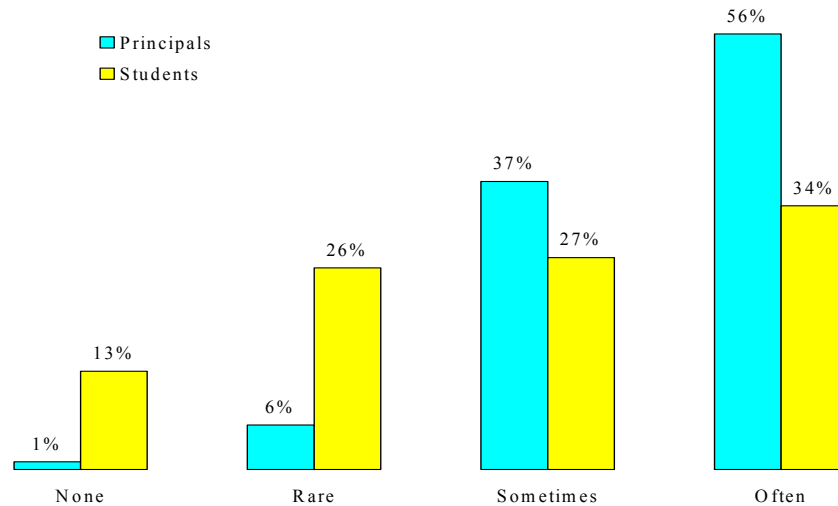
The chart is divided into quadrants based on the median value for importance and frequency. As with the various skills, knowledge and attitudes, the frequency that students engaged in activities was fairly closely related to the perceived importance of those activities. Students engaged in investigations and searches and attending at provincial and supreme court alone more than their relative importance would justify but there were almost no activities where the importance was not matched by the frequency. Only in the case of completing an entire transaction could we say that the frequency was less than optimal.

As with skills, knowledge and attitudes, the fact that principals and students match the frequency of activities with their perception of the relative importance does not necessarily mean that the relationship is appropriate. Whether students should engage in very little drafting and a lot of court preparation is a matter that could be considered by the Bar Admission Program Task Force.

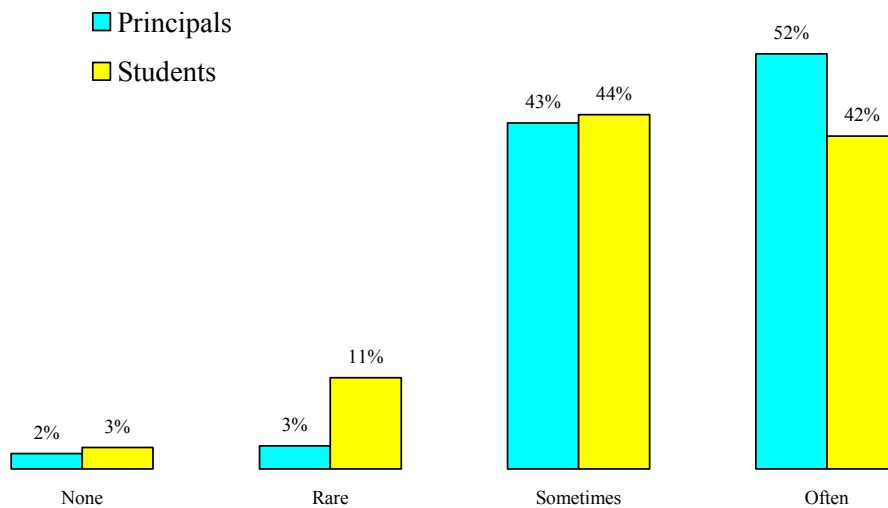
Supervision During Articles

The questionnaire asked a number of questions about the frequency and quality of supervision that students received during their articles.

Students and principals were asked to evaluate the frequency of supervision and feedback provided to the students by three different groups. The first group was principals. The following chart shows the distribution of responses.



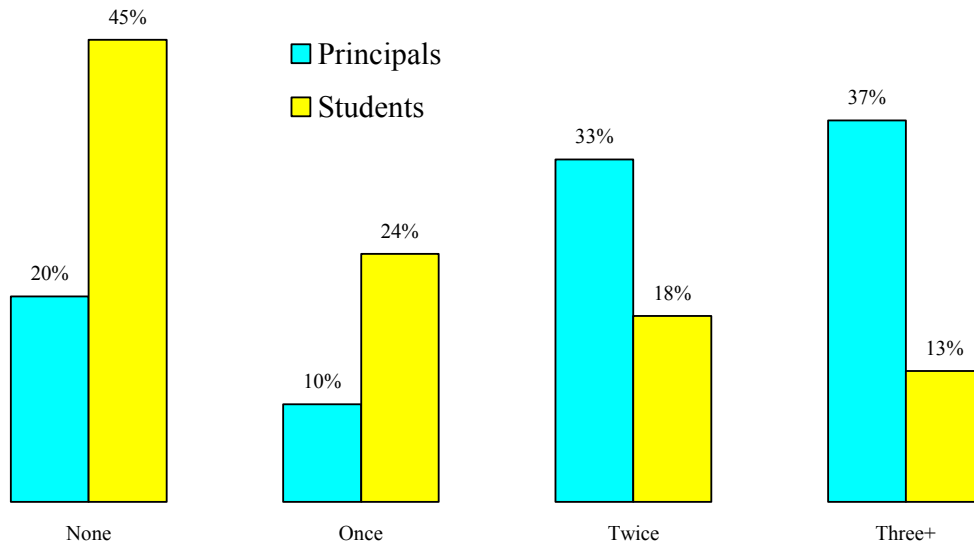
More than half of the principals indicated that they often provided supervision and feedback while only about a third of the students agreed. Overall, 13% of the students said that they received no supervision or feedback during their articles from their principals. This is not quite as dire as it may sound because a significantly greater percentage of students indicated that they received supervision and feedback from other lawyers, as the following chart shows.



In total, 86% of the students indicated that they received supervision and feedback sometimes or often from other lawyers during their articles. In particular, 15 of the 19 students who said

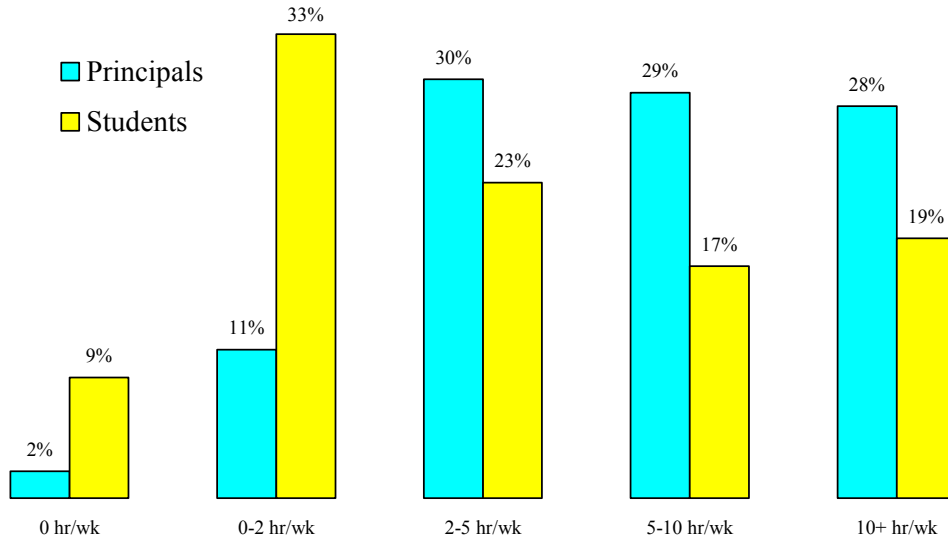
they received no supervision or feedback from their principal during articles indicated that they received supervision and feedback sometimes or often from other lawyers. More than 50% of the students also indicated that they sometimes or often received supervision and feedback from non-legal staff.

In terms of evaluation, there was a considerable discrepancy between the students' perception of the frequency that they received formal evaluation or performance reviews and that of the principals, as the following chart illustrates.



While only 20% of the principals said that they provided no formal evaluation or performance reviews, 45% of the students indicated that they did not receive any. On the other hand, 70% of the principals said that they provided two or more formal evaluations or performance reviews during articles compared with only 31% of the students who acknowledged receiving them. Clearly the results indicate a difference in perception regarding formal evaluation or performance reviews and they suggest an opportunity for improvement if formal evaluation is considered a desirable goal.

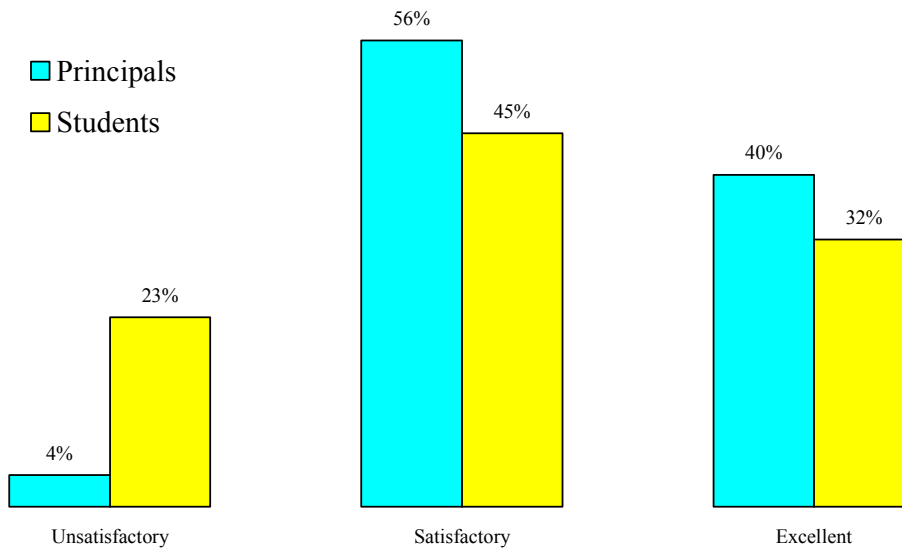
Students and principals were also asked to say how many hours a week they spent together or that the students spent with another supervising lawyer.



While only 13% of the principals indicated that they spent 2 or less hours on average per week with their student, 42% of the students said that this was the case. In the absence of guidelines as to the amount of time that students and principals should spend together, some principals and students may not feel that more than 2 hours is necessary.

About one third of the students said that they had a formal mentor other than their principal. This was almost exclusively the experience of students in firms with more than 100 lawyers.

Finally, students and principals were asked to evaluate the overall quality of supervision and evaluation

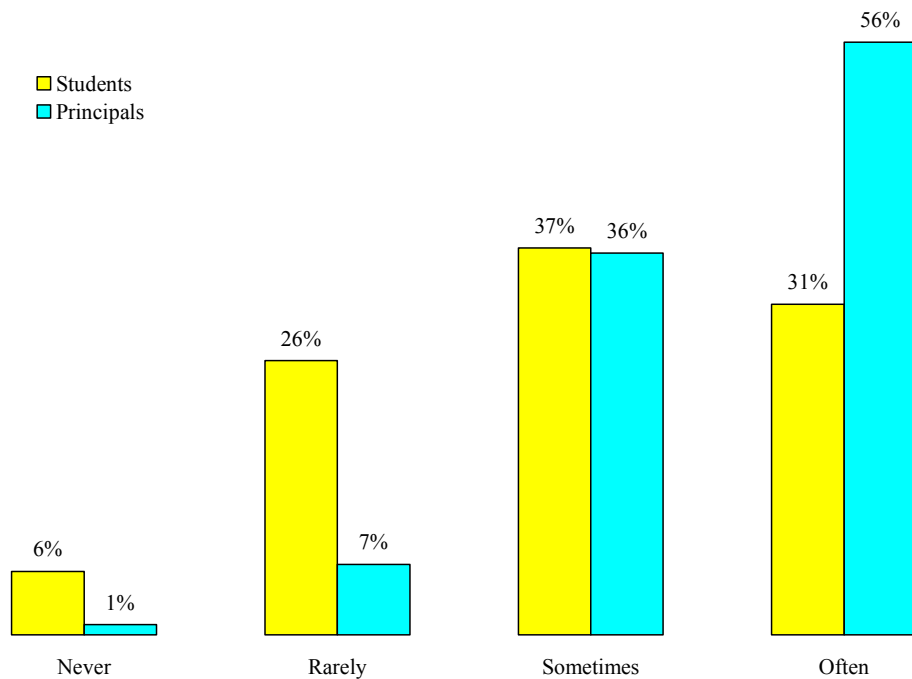


As the responses show, while very few of the principals described their own performance as unsatisfactory, 23% of the students thought the quality of supervision and evaluation was unsatisfactory. On the other hand, 32% of the students described their principals' performance as excellent.

In terms of the factors identified in the survey that might influence the perception of the principals' quality of supervision and evaluation, the opportunity to discuss ethical obligations had the most influence, followed by the degree of supervision from other lawyers. Although the amount of time spent with the principal, the number of lawyers at the firm and whether the student was hired back all had some impact on the perception of the quality; it was much less than factors relating to the provision of ethical information and general supervision.

Ethical Education during Articles

Students and principals were asked four questions about the extent of opportunities for ethical education during articles. While more than half of the principals said that they were often provided opportunities to discuss ethical obligations and provided positive examples of ethical behaviour, students were less likely to indicate that these happened often. The following chart shows the responses of students and principals when asked the extent students were provided with an opportunity to discuss ethical obligations.

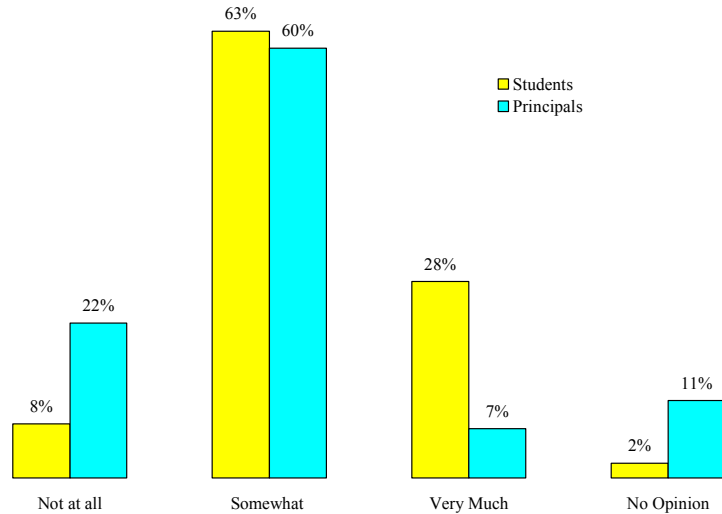


In terms of providing written information describing ethical obligations and exposure to ethical dilemmas in a supervised setting, more than half the students said never or rarely. Given the perceived importance of a knowledge of ethical obligations by both students and principals in this survey and the 1997 survey and the extent to which students felt they learned about these obligations during articles, there may be an opportunity to improve articles by defining the extent of ethical education that the Law Society expects principals to provide.

Opinions about Articling

Last but certainly not least, students and principals were given the opportunity to respond to five opinion questions concerning articling.

Does Articling Need Improving?



The student and principal responses are mirror images, in the sense that about the same percentage of principals thought that articling did not need improving at all as students who thought that it needed improving very much.

Quality of supervision, average hours with the principal and the frequency of supervision by other lawyers were the most significant factors influencing the student responses. As we might expect, for principals the most significant factor was their perception of their own quality of supervision.

Some of the students who indicated that they thought articling needed improving very much made the following comments:

“No supervision of principals/law firm. No penalty for law firm if they don't meet obligations re: articling - No seminars for students other than PLTC.”

“Principal is not mandated to interact with the student. My principal spoke with me once the entire time I was articling. No requirement to have internal reviews or evaluations of students which I feel would have helped me in getting some feedback from the firm.”

“My principals appeared to have no supervision, nor standards as to how they conducted the article, other than the evaluation at end of year. Most of the time I was a glorified secretary. Facilities were cramped & inadequate. A couple of times I literally worked off the floor of the photocopy room/storage area.”

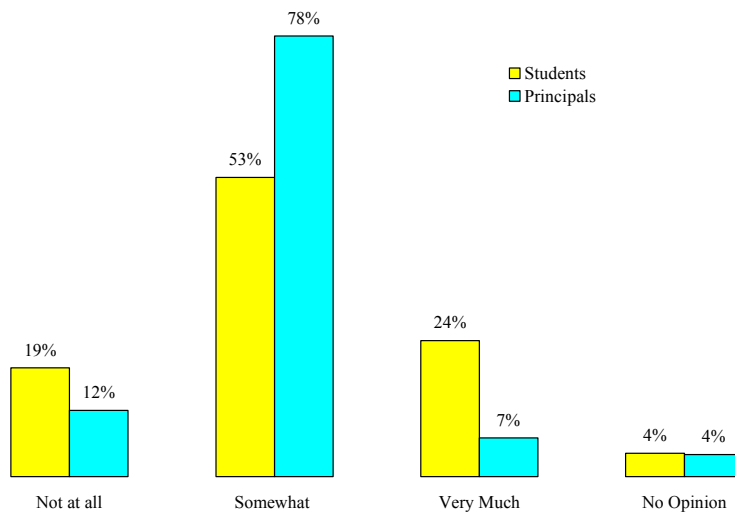
Some of the principals who indicated that articling could be improved somewhat or very much made suggestions:

- “1. Provide each principal at the beginning of each articling period with a list of topics covered by student in PLTC.
2. Advise each principal if students informed on what to expect during articles and if so, what students informed
3. Provide principals with suggested guidelines on teaching and evaluation techniques, i.e. best method to assess work, benefits of student working with several lawyers vs. one lawyer, reasonable time to spend with students”

“Perhaps a pre-articling (post-law school) bar admission/screening course to ensure that students meet certain minimum standards.”

While not everyone agreed on the need for improvement, a significant majority of respondents, both principals and students, agreed that some improvement was in order.

Could your Principal have done more to improve your experience?



On this question the student responses were less moderate than their principals, with 19% of the students responding “not at all” (compared with 12% of the principals) and 24% indicating “very much” (compared with 7% of the principals).

Not surprisingly, the most significant factors influencing student responses to this question were the frequency of supervision and feedback by the principal, the opportunity to discuss ethical obligations and the overall assessment of the quality of supervision. The only factor that had any significant relationship to the principal’s responses was the assessment of their own quality of supervision.

Students who thought that their principal could have done very much more made the following comments:

“Some sort of supervision or guidelines for principals/firms who hire articulated students. More emphasis on writing skills, file management & solicitor's work - within the context of the articling period (not in PLTC).”

“1) Provide principals with instruction on how to teach and provide effective feedback. 2) Ensure that students have a broad exposure - have principals submit plan 3) Set up a mentoring program to allow isolated students opportunity to gauge their experiences (am I really an inept simpleton or could it be my boss is an overbearing ...?) 4) Provide hardship funding for students who receive no pay during PLTC, esp. if they have to support children.”

“Make it a requirement that each principal be provided a list of activities, court appearances, etc that a student could be expected to perform during the articling year and require that at the beginning of articles, or before, the principal meet with the student to discuss the list and to structure the student's year based on that list.”

“Perhaps a memo or letter to lawyers (particularly those acting as principals) reminding them of the importance of ensuring that articling students receive solid training. Articling students should not be treated by firms as a source of cheap labour. There is an onus on each student to work hard and learn as much as they can, but there is also an onus on law firms to take an active interest in seeing their articling students develop into lawyers.”

“Law Society should check to see if students are ok during articles. Don't just ask them after it's over. The bench interview should be done 2x once in the middle of articles. Check on them during to prevent burnout etc. & address what has not been done on the checklist.”

“Yes, provide articulated students with an opportunity to meet with a representative of the LS to review what work is being given to student and what work the students should be exposed to. After this meeting, a meeting could be scheduled and/or a letter sent explaining to the principal of what areas of law a student should have the opportunity to work in.”

“Principals should be vetted thoroughly by the LS before they are entrusted with the responsibilities associated with the articling process. Not just every lawyer should be allowed this role!”

“better qualification of principals; identify core skill sets that must be addressed during the article year; somehow ensure that a balanced, well rounded experience is the gold of articles.”

Principals who indicated that they could have done somewhat or very much more made the following comments:

“Perhaps principals should have to provide references or application forms. As the LS is aware, not all practitioners should be principals. I have seen several students conduct themselves inappropriately but in my view this is a reflection on the principal. In my community, the members of the bar report to each other if ever there is a concern about a student so that the problem can be corrected as soon as possible.”

“perhaps firms should have to meet some minimum criteria.”

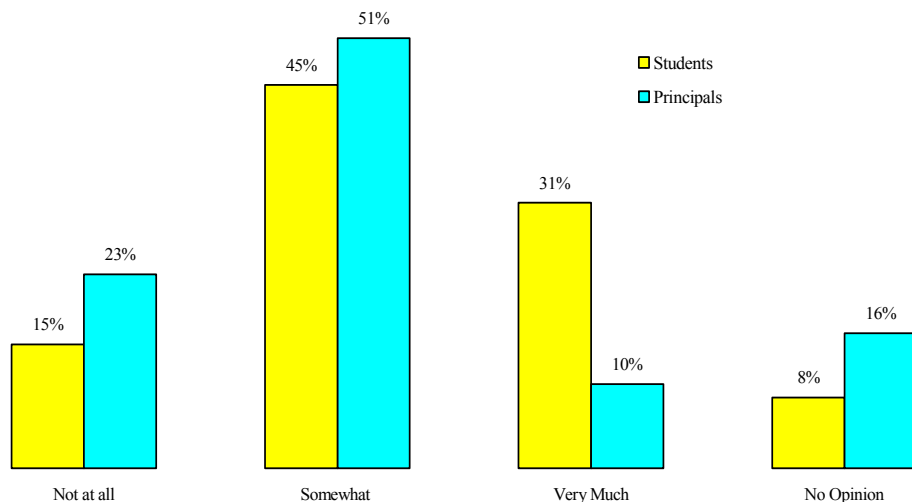
“PLTC should be completed before articling as the law firm commences - believe that would be of benefit to both the student and the firm. Basic practice skills would be learned at the outset without disruption to articling time at the office.”

“PLTC before then, office 12 months”

“Split the PLTC process in segments over the year. Provide more specific instructions to principals. Underscore the responsibility of serving as a principal.”

Overall, the responses indicate that a significant majority of both students and principals recognize that the principal could have done more. The challenge may be determining what that “more” should be and assisting principals to provide it.

Could the Law Society do more to improve articling?



Students were more inclined to believe that the Law Society could do more to improve articling than the principals, with 31% indicating that the Law Society could do “very much” more. Moreover, compared with the other opinion questions, a much larger percentage of students and principals indicated that they had no opinion.

Students who indicated that they thought the Law Society could do very much more made the following comments:

“It might be helpful for the LS to have an informal (i.e. phone contact) with students half way through to see how things are going.”

“students should be able to provide feedback about their articling experience to the LS & have them discuss with the principals.”

“Formal interim evaluation which required feedback/mtg w/supervisor; required monthly mtgs w/principal w/ a set agenda for discussion; training for principals about their role; require firms to provide orientations to students esp. large downtown firms”

“Establish minimum standards for principals; -work hours expectations; -pay & benefits; - grievance procedures; -(simplified) transfer mechanism if necessary; - perhaps a specific code of ethics and conduct guidelines could be integrated into the contract.”

“Consider a process of reviewing suitability of principals or firms - if survey is conducted of students at end of their term make it confidential and do not provide individual feedback to firm (few students want to carry a reputation as a complainer). At the same time you should not take an individual complaint too seriously - look for patterns. I recognize it is difficult to get people to act as principal but better not to have a disinterested one.”

“Firms should be "authorized" to take students - some firms abuse the privilege. It should be an honour bestowed upon firms that show they are willing to put in the time and effort to educate future lawyers & colleagues.”

“1) The Law Society should ensure that firms are safe for articling students. Several of my classmates endured very abusive conditions (verbal abuse, humiliation, poor physical working conditions), but were loathe to report to the Law Society because of isolation for fear of not getting other articles. 2) The length of articles should be extended by at least 6 months, to ensure that all students complete all of the requirements in depth, and not in a cursory way.”

Principals who indicated that the Law Society could do somewhat or very much more to improve articles commented:

“Warn students about PLTC failure rates at beginning of PLTC. Give specific stats so taken seriously. Advise them their call dates may be delayed if they have to rewrite. Advise them firm not obligated to keep them working if they fail.”

“Guest lecturers in PLTC often not helpful information imparted is largely anecdotal (as advised by student)”

“cut down PLTC time”

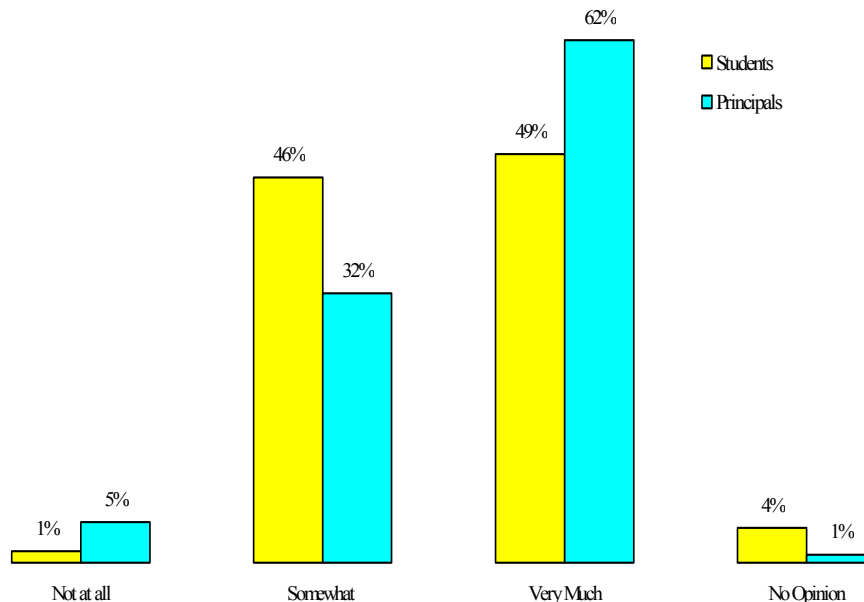
“Split the PLTC process in segments over the year. Provide more specific instructions to principals. Underscore the responsibility of serving as a principal.”

“Make PLTC longer or more practice areas to be selected. Too much crammed into short time; information or law firm management & file management significant.”

“I should know syllabus of PLTC. E.g. how much ethics do they study? We were able to provide lots of experience with clients, moderately complicated files, lots of interviews and court experiences. Good provincial court experience.”

Once again, a significant majority of the students and principals thought that the Law Society could do somewhat or very much more to improve articles. The student comments tended to focus on Law Society supervision of principals and the articling process while principals’ comments tended to focus on the use and improvement of PLTC.

How valuable was the student was to the firm?



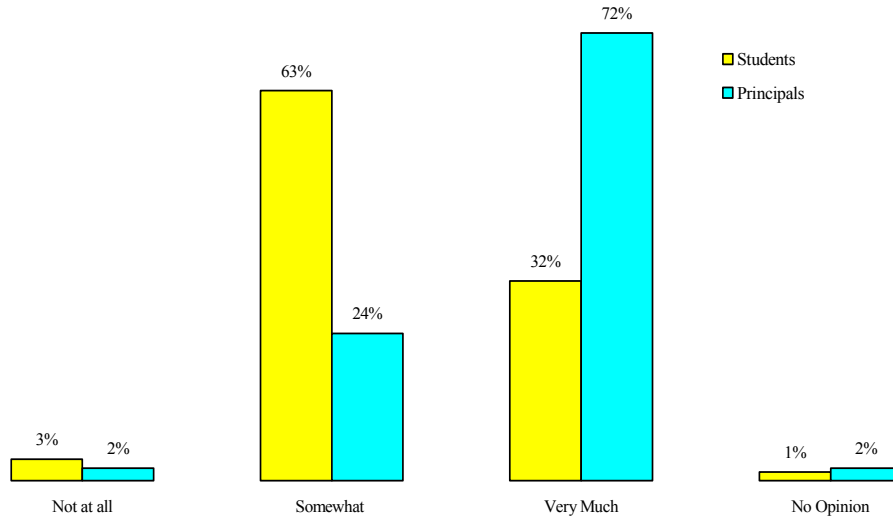
Students had more difficulty defining themselves as “very” valuable to the firm than did their principals. Overall, nearly two-thirds of the principals said their students were very valuable. Even where the student was not kept on by the firm, 61% of the principals said that the student was very valuable.

The only factor that influenced the principals perception of the value of the student was the average number of hours that the student worked per week, with principals who perceived that

their students worked less than 40 hours per week being less likely to say that the students were very valuable.

The responses to this question suggest that the process of articling has value for the firms over and above any sense of professional responsibility.

Were you prepared to commence the practice of law upon admission to the bar?



As with the first question, the student and principal responses are almost mirror images of each other. While 72% of the principals thought that the students were very much prepared to commence the practice of law, only 32% of the students felt this way. Students were much more inclined to be cautious on this question, with nearly two-thirds indicating that they felt *somewhat* prepared to commence the practice of law.

Those students who said that they were very much prepared to commence the practice of law were much more likely to have said that they learned more skills, knowledge and attitudes in articles and engaged more in research and writing, interview and counselling clients, attending at examinations for discovery and negotiations, attending on motions by themselves and with a lawyer, provincial or supreme court with a lawyer, conducted closings, drafted a fee bill and set up and closed files.

Students who indicated that they were very much prepared to commence the practice of law made the following comments about the strengths of articles:

“Gave me the confidence and ability to choose to go out on my own and be able to handle files from beginning to end.”

“Lots of chances to learn and make mistakes without the full blown consequences”

“I got varied and challenging work as an articling student and learned prognostic knowledge and skills in PLTC.”

“enables student to acquire invaluable experience in somewhat controlled setting; mentors are extremely important and articling enables student to form relationships in this regard that extend beyond articling; wide exposure to different practice areas; pressures of billing relaxed so learning promoted.”

On the other hand, one student who felt not at all prepared for practice stated:

“It seems many lawyers have had poor articling experiences and tend to want to validate their own experience by exacting just as miserable time on others as they had to endure. Let's stop the cycle of abuse.”

Observations

As any lawyer who has ever conducted a trial can tell you, two people can be in the same place at the same time and experience the same event and still come away with very different recollections. For this reason, survey results are not fact; they are the respondents' understanding of the facts. But when enough of the respondents tell the same story, on a balance of probabilities, we ought to believe them.

The story told by the students and principals is not always the same. There are some areas, however, where there is sufficient concurrence that we ought to listen. The results of the survey suggest that there is a perceived need for improvement in the articling program and that the Law Society could do more to define what is expected of both principals and students during articles.

In particular, the Law Society might identify the skills, knowledge and attitudes it considers important and define the activities that it expects students will experience during articles. Should students learn little about operating a law office, trust accounting and financial management during articles? Is it appropriate that students learn less about solicitors' practice and more about litigation during articles?

The Law Society might also consider establishing standards for supervision and evaluation by the principal. Not only would this address the concerns expressed by a number of students but a number of principals felt that they did not have clear guidance about what was expected and so muddled through.

Overall, it seems unlikely that the institution of articling is broken. Nevertheless, a significant majority of those who have most recently participated feel that there is room for improvement.

Appendix A

I. INTRODUCTION

The Law Society is reviewing the articling program and invites the views of B.C. lawyers who were called in the last two years. Please answer the following questions and feel free to provide additional comments.

The survey should take about 15 minutes to complete. Any identifying information will remain confidential.

Please return the completed survey to:

Alan Treleaven, Director, Professional Legal Training
Law Society of British Columbia
845 Cambie Street
Vancouver, BC V6B 4Z9

II. PERSONAL INFORMATION

- A. When were you called? _____
- B. When were you born? _____
- C. What is your gender? ☐ male ☐ female

III. EXPOSURE TO PRACTICE AREAS

To what extent were you *exposed* to the following areas during articling? Check **one box** for **each** area of practice.

	Not at All	Somewhat	Very Much	Can't Recall
1. Criminal Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Residential Real Estate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Commercial Real Estate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Company Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Securities Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Estates, Wills and Trusts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Civil Litigation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Family Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Tax Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Labour/Employment Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Intellectual Property Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Administrative Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Other (describe) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IV. EDUCATION AND TRAINING

- A. Did you rotate between departments or gain exposure to a variety of areas of practice?

☐ yes ☐ no If yes, please provide percentage of time you worked in each area:

____ real estate ____ criminal law ____ civil litigation
____ estates, wills and trusts ____ corporate/company law ____ family law
____ other (describe) _____

- B. Please check all items provided to you by the firm:

☐ orientation ☐ written training materials ☐ in-firm seminars
☐ outside courses at firm cost ☐ outside conferences at firm cost ☐ outside dinner seminars at firm cost

Appendix A

V. LEARNING DURING ARTICLES

Students learn a variety of skills, knowledge and attitudes during articles. Please check **one box** under Importance and **one circle** under Extent for each item. Importance means the importance of learning to the legal profession. Please answer the first column (Importance) before the second column (Extent). Do not include learning, which occurred during PLTC or law school.

	IMPORTANCE				EXTENT			
	How important is it that the following be learned during articling?				To what extent did you learn this during articling?			
	None	Little	Moderate	Considerable	None	Little	Moderate	Considerable
1. Legal Skills								
a) fact investigation/analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) negotiating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) legal research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) legal analysis/reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) problem-solving/judgment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f) legal drafting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g) interviewing/counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h) advocating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i) legal writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Management skills								
a) operating a law office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) client management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) financial management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) file management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Professional attitude								
a) knowledge of the role of the Law Society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) knowledge of Professional Conduct Handbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) knowledge of ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) knowledge of trust accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) positive personal attributes (e.g., empathy, integrity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Legal knowledge								
a) substantive law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) procedural law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) legal theory/jurisprudence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) legal process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix A

VI. ACTIVITIES COMPLETED DURING ARTICLES

Students complete a variety of activities during articling. Please check **one box** under Importance and **one circle** under Frequency for each activity listed below. Importance means the importance to the legal profession. Please answer the first column (Importance) before the second column (Frequency).

ACTIVITIES	IMPORTANCE How important is it to complete the following activities during articling?			FREQUENCY To what extent did you engage in the following activities?				
	Not Important	Somewhat Important	Important	Never	Rarely	Sometimes	Often	Not Sure
1. Conducting research and writing memos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Attending examinations for discovery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Appearing alone on motions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Attending on motions with a lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Appearing alone in small claims or criminal court	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Attending at small claims or criminal court with another lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Assisting with court preparation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Attending in Provincial or Supreme Court alone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Attending in Provincial or Supreme Court with another lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Negotiations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Conducting closings (real estate or corporate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Interviewing and counselling clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Interviewing witnesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Conducting investigations/searches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Drafting family law agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Drafting wills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Drafting security documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Drafting corporate documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Drafting real estate documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Drafting civil litigation documents (e.g., pleadings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Drafting contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Writing legal opinions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. Completing an entire transaction from beginning to end	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24. Drafting a fee bill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25. Setting up and closing files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix A

VII. SUPERVISION AND EVALUATION

A. Please indicate the frequency of supervision and feedback provided to you:

	None	Rare	Sometimes	Often
1. From principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. From other lawyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. From non-legal staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Please indicate the frequency of formal evaluation or performance reviews provided to you:

	None	Once	Twice	Three+
1. From principal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. From other lawyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. From non-legal staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. On average how many hours a week did you spend with your principal or another supervising lawyer?

☐ 0 hr/wk ☐ 0-2 hr/wk ☐ 2-5 hr/wk ☐ 5-10 hr/wk ☐ 10 or more/wk

D. Did you have a formal mentor other than your principal?

☐ yes ☐ no

E. How would you describe the overall quality of supervision and evaluation provided by the firm?

☐ unsatisfactory ☐ satisfactory ☐ excellent

VIII. ETHICAL EDUCATION

To what extent were you:

	Never	Rarely	Sometimes	Often
1. Provided with an opportunity to discuss your ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Provided with written information describing ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Provided with positive examples of ethical behaviour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Exposed to ethical dilemmas in a supervised setting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IX. WORKING CONDITIONS

A. Your monthly salary range was:

☐ under \$2000/month ☐ \$2,000 - \$2,500/month ☐ greater than \$2,500/month

B. Please check the number of hours, on average, you tended to work per week:

☐ less than 40 ☐ 40 - 60 ☐ 60 - 80 ☐ over 80

C. Were you expected to bill a certain number of hours or meet financial targets? ☐ yes ☐ no

If yes, state number or amount _____.

D. Approximately what percentage of students were hired back as lawyers in your year? _____%

E. Were you hired back at your articling firm? ☐ yes ☐ no

F. Were you paid a salary while at PLTC ☐ yes ☐ no
If "yes", what percentage of your regular salary were you paid _____%

G. Were your call fees paid by your articling firm? ☐ yes ☐ no

H. Were your PLTC fees paid by your articling firm? ☐ yes ☐ no

Appendix A

X. LAW OFFICE INFORMATION

A. Type of office where you articulated:

☐ law firm ☐ government dept. ☐ corporate legal dept. ☐ other _____

B. Number of lawyers in the firm (if a corporate/government department, state number in department):

☐ 1 ☐ 2-5 ☐ 6-20 ☐ 21-50 ☐ 51-100 ☐ 100+

C. Number of articling students who worked in the firm (or corporate/government department) in the year you articulated:

☐ 1 ☐ 2 ☐ 3-5 ☐ 6-10 ☐ 10+

D. Number of those articling students who were: male _____ female _

XI. GENERAL OPINIONS ABOUT ARTICLING

To what extent:

	Not at All	Somewhat	Very Much	No Opinion
A. Does articling need improving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Could your Principal have done more to improve your experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Could the Law Society do more to improve articling?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Were you valuable to the firm?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Were you prepared to commence the practice of law upon admission to the bar?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

XII. STRENGTHS OF ARTICLING

Please provide any other comments you have about the strengths of the current articling process.

XIII. WEAKNESSES OF ARTICLING

Please provide any other comments you have about the weaknesses of the current articling process.

Appendix A

XIV. SUGGESTIONS FOR IMPROVEMENTS TO ARTICLING

Please provide any suggestions you have about how to improve the current articling process.

XV. OTHER COMMENTS

Please provide any other comments or suggestions you have about the articling process.

Appendix B

I. INTRODUCTION

The Law Society is reviewing the articling program and invites the views of B.C. lawyers who acted as principals to students called in the last two years. Please answer the following questions and feel free to provide additional comments. If you have acted as a principal for more than one student in the last two years, please answer the questions in relation to the **most recent** student who completed articles under your supervision.

The survey should take about 15 minutes to complete. Any identifying information will remain confidential.

Please return the completed survey to:

Alan Treleaven, Director, Professional Legal Training
Law Society of British Columbia
845 Cambie Street
Vancouver, BC V6B 4Z9

II. PERSONAL INFORMATION

- A. *When were you called?* _____
- B. *When were you born?* _____
- C. What is your gender? ☐ male ☐ female

III. EXPOSURE TO PRACTICE AREAS

To what extent was your student *exposed* to the following areas during articling? Check **one box** for **each** area of practice.

	Not at All	Somewhat	Very Much	Can't Recall
1. Criminal Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Residential Real Estate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Commercial Real Estate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Company Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Securities Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Estates, Wills and Trusts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Civil Litigation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Family Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Tax Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Labour/Employment Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Intellectual Property Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Administrative Law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Other (describe) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IV. EDUCATION AND TRAINING

A. *Did your student rotate between departments or gain exposure to a variety of areas of practice?*

☐ yes ☐ no If yes, please provide percentage of time your student(s) worked in each area:

____ real estate ____ criminal law ____ civil litigation
____ estates, wills and trusts ____ corporate/company law ____ family law
____ other (describe) _____

B. *Please check all items provided to your student by the firm:*

- ☐ orientation ☐ written training materials ☐ in-firm seminars
☐ outside courses at firm cost ☐ outside conferences at firm cost ☐ outside dinner seminars at firm cost

Appendix B

V. LEARNING DURING ARTICLES

Students learn a variety of skills, knowledge and attitudes during articles. Please check **one box** under Importance and **one circle** under Extent for each item. Importance means the importance of learning to the legal profession. Please answer the first column (Importance) before the second column (Extent). Do not include learning which occurred during PLTC or law school.

	IMPORTANCE				EXTENT			
	How important is it that the following be learned during articling?				To what extent did your student learn this during articling?			
	None	Little	Moderate	Considerable	None	Little	Moderate	Considerable
1. Legal Skills								
a) fact investigation/analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) negotiating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) legal research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) legal analysis/reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) problem-solving/judgment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f) legal drafting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g) interviewing/counseling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h) advocating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i) legal writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Management skills								
a) operating a law office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) client management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) financial management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) file management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Professional attitude								
a) knowledge of the role of the Law Society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) knowledge of Professional Conduct Handbook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) knowledge of ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) knowledge of trust accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e) positive personal attributes (e.g., empathy, integrity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Legal knowledge								
a) substantive law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b) procedural law	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c) legal theory/jurisprudence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d) legal process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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VI. ACTIVITIES COMPLETED DURING ARTICLING

Students complete a variety of activities during articling. Please check **one box** under Importance and **one circle** under Frequency for each activity listed below. Importance means the importance to the legal profession. Please answer the first column (Importance) before the second column (Frequency).

ACTIVITIES	IMPORTANCE How important is it to complete the following activities during articling?			FREQUENCY To what extent did your student engage in the following activities?				
	Not Important	Somewhat Important	Important	Never	Rarely	Sometimes	Often	Not Sure
1. Conducting research and writing memos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Attending examinations for discovery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Appearing alone on motions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Attending on motions with a lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Appearing alone in small claims or criminal court	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Attending at small claims or criminal court with another lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Assisting with court preparation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Attending in Provincial or Supreme Court alone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Attending in Provincial or Supreme Court with another lawyer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Negotiations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Conducting closings (real estate or corporate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Interviewing and counselling clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Interviewing witnesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Conducting investigations/searches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. Drafting family law agreements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. Drafting wills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Drafting security documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Drafting corporate documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. Drafting real estate documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Drafting civil litigation documents (e.g., pleadings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. Drafting contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. Writing legal opinions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. Completing an entire transaction from beginning to end	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24. Drafting a fee bill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25. Setting up and closing files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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VII. SUPERVISION AND EVALUATION

A. Please indicate the frequency of supervision and feedback your student received during articles:

	None	Rare	Sometimes	Often
1. From you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. From other lawyer(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. From non-legal staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Please indicate the frequency of formal evaluation or performance reviews your student received during articles:

	None	Once	Twice	Three+
1. From you	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. From other lawyer(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. From non-legal staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C. On average how many hours a week did your student spend with you or another supervising lawyer?

☐ 0 hr/wk ☐ 0-2 hr/wk ☐ 2-5 hr/wk ☐ 5-10 hr/wk ☐ 10 or more/wk

D. Did your student have a formal mentor other than you?

☐ yes ☐ no

E. How would you describe the overall quality of supervision and evaluation provided by your firm?

☐ unsatisfactory ☐ satisfactory ☐ excellent

VIII. ETHICAL EDUCATION

To what extent was your student:

	Never	Rarely	Sometimes	Often
1. Provided with an opportunity to discuss his or her ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Provided with written information describing ethical obligations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Provided with positive examples of ethical behaviour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Exposed to ethical dilemmas in a supervised setting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IX. WORKING CONDITIONS

A. Your student's monthly salary range was:

☐ under \$2000/month ☐ \$2,000 - \$2,500/month ☐ greater than \$2,500/month

B. Please check the number of hours, on average, your student tended to work per week:

☐ less than 40 ☐ 40 - 60 ☐ 60 - 80 ☐ over 80

C. Was your student expected to bill a certain number of hours or meet financial targets? ☐ yes ☐ no

If yes, state number or amount _____.

D. Approximately what percentage of students at your firm were hired back as lawyers in the most recent year? _____%

E. Was your student hired back at your firm? ☐ yes ☐ no

F. Were your student paid a salary while at PLTC ☐ yes ☐ no

If "yes", what percentage of your student's regular salary was paid _____%

G. Were your student's call fees paid by your firm? ☐ yes ☐ no

H. Were your student's PLTC fees paid by your firm? ☐ yes ☐ no

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X. LAW OFFICE INFORMATION

A. *Type of office where articles took place:*

☐ law firm ☐ government dept. ☐ corporate legal dept. ☐ other _____

B. *Number of lawyers in the firm (if a corporate/government department, state number in department):*

☐ 1 ☐ 2-5 ☐ 6-20 ☐ 21-50 ☐ 51-100 ☐ 100+

C. *Number of articling students who worked in the firm (or corporate/government department) in most recent year:*

☐ 1 ☐ 2 ☐ 3-5 ☐ 6-10 ☐ 10+

D. *Number of those articling students who were:* male _____ female _

XI. GENERAL OPINIONS ABOUT ARTICLING

In your opinion:

		Not at All	Somewhat	Very Much	No	Opinion
A.	Does articling need improving?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
B.	Could you have done more to improve your student's articling experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
C.	Could the Law Society do more to improve articling?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
D.	Was your student valuable to the firm?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
E.	Was your student prepared to commence the practice of law upon admission to the bar?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

XII. STRENGTHS OF ARTICLING

Please provide any comments you have about the strengths of the current articling process.

XIII. WEAKNESSES OF ARTICLING

Please provide any comments you have about the weaknesses of the current articling process.

XIV. SUGGESTIONS FOR IMPROVEMENTS TO ARTICLING

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Please provide any suggestions you have about how to improve the current articling process.

XV. OTHER COMMENTS

Please provide any other comments or suggestions you have about the articling process.
