



**2021**

**Law Practice Program  
Training Portfolio**

**LAW  
PRACTICE  
PROGRAM**



# LAW PRACTICE PROGRAM TRAINING 2021 PORTFOLIO

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*(Note: the training was followed by a 4 month work experience with a lawyer, during which Candidates had the same status as with an articling position)*

## GENERAL OVERVIEW

- Training ran from August 30th to December 20th, 2021; 17 weeks of training in a simulated work environment; interactive online simulation of a law practice, using technologies including Zoom and D2L.
- Candidates are organized in “law firms” of 3 – 6, each with a practicing lawyer as a Mentor (2 Mentors over the 4 months).
- Case files were developed by practicing lawyers. Files and related work were delivered to the law firms over time, and simultaneously – candidates juggled priorities.
- The training was work, not school. Candidates came ready for work, and were expected to conduct themselves as though they were working, throughout the training.

## GENERAL – COMPLETED DELIVERABLES

### General File Work

- ✓ Open new files; conduct conflict checks; receive and review instructions from Senior partners, law clerks and others; receive and review correspondence; review resources, including video “meetings” with Senior Partners (ie our “Subject Matter Experts” – SMEs); prepare memos to file; docket time (all matters, billable and non-billable).
- ✓ Firms engage with the Clio file management system, Google Drives for file creation/management/ collaboration and sharing, and Zoom Video Conferencing.
- ✓ Prepare for and attend weekly web conference Firm Meetings with Partner/Mentor, including discussions on Professionalism and Ethics, Client Management and Practice Management issues.
- ✓ File discussions among Firm and with Mentor to review work.
- ✓ LPP file management review (“file audit”).
- ✓ Participate in weekly Monday morning web conference meetings with Managing Partners.
- ✓ Participate in “live” Case File SME webinars including with:
  - Administrative Law: [Jacqueline Swaisland](#)
  - Business Law: [Arlene O’Neill](#) and [George Tory](#)
  - Civil Law: [Patrick Brown](#) and [Jim Davidson](#)
  - Criminal Law: [Robin Flumerfelt](#) and [Paula Seymour](#)
  - Family Law: [Sheri Hirschberg](#)
  - Real Estate Law: [Raquel Levine](#)
  - Wills & Estates: [Ian Hull](#)

## Intensive Trial Advocacy

Intensive Trial Advocacy Program (with advance prep-work and draft Case Brief for the Dolan File), led by Sheila Block and Prof. Jim Seckinger and a team of litigation expert Advisors. The three individual workshops culminated in a final trial in which Candidates conducted direct and cross examinations, acted as witnesses, and did an opening or a closing. This was the largest simulated set of simultaneous Zoom trials.

Candidates completed the following deliverables:

- ✓ Prepare for trial
- ✓ Draft Questions for Examination-in-Chief and Cross-Examination
- ✓ Prepare an opening and closing statement
- ✓ Prepare for and play witness for their own side
- ✓ Conduct trial/examination-in-chief and cross-examination
- ✓ Conduct an opening or closing statement at the trial

## Special “Firm” Project: Innovation in Law and Business Planning

- ✓ Every Firm prepares a Business Plan for the delivery of legal services to consumers/clients in an effective, modern, 21st century way that will benefit the consumer, as well as the provider.
- ✓ Consideration to both the Rules of Professional Conduct and the use of technology/modern business practices.
- ✓ Firms looked at the “why and what” for their Firm; marketing and networking; the modern approach with technology; and the money and financials. Participated in several relevant expert meetings and engaged in a Design Workshop using the online visual collaboration tool, MURAL. Firms had to develop and include financial statements, and had to “pitch” their business plan to a practicing lawyer in December.
- ✓ Innovation in Law and Business Planning workshops, including sessions with [Darlene Tonelli, Inter Alia Law](#);

## Additional Non-Specific File Work

- ✓ Complete the Stitt, Feld, Handy Negotiation Program, including live workshops and an Online Negotiation Course resulting in Certification
- ✓ Participate in the Self-Represented Litigant (SRL) series of sessions and workshops with the NSRLP, including meetings with SRLs
- ✓ Participate in Legal Research Workshops with Experts [Neil Guthrie](#), [Caroline Mandell](#) and [Jon Khan](#), as well as complete 3 individual varied Legal Research matters and written Memoranda; 8 Urgent Research Memoranda; and a Case Comment
- ✓ Online Legal Research training for Lexis Advance Quicklaw and WestlawNext Canada
- ✓ Participate in live Drafting Webinars with [Inga Andriessen](#) and complete
- ✓ 2 additional Drafting Assignments (Commercial Contract; Employment Contract) and draft a reporting letter to the client explaining the draft agreement
- ✓ Engage in Client Interview and Communication Workshops with [Ian Hull](#), [Stephanie Mitchell](#) and Client Simulators through [Ryerson’s Live Action Simulation Program](#)

- ✓ Engage in Teamwork Presentations, Workshops and Deliverables with Dr. Pat Sniderman
- ✓ Intensive In-house Counsel Webinars, Panels and Workshops, and submission of four In-house Counsel Scenario deliverables, with experts Anne Feehely (BMO), Jennifer Hall (MOH and MLTC), Lynn Korbak (Toromont), Judy Naiberg (Rogers), Thomas Santram (Cineplex)
- ✓ Regular in-house Coffee Chats with over 40 In-house Counsel and Firm Consideration
- ✓ Online File “Audit”/Practice Management Review with Independent Reviewer
- ✓ Monthly Professionalism Quizzes reviewing all professionalism themes covered throughout the Training
- ✓ Docketing all file and non-file, billable and non-billable time using Clio
- ✓ Monthly PD Sessions including themes: Resume and Cover Letter Writing; Preparing for the Interview; Outreach and Networking; Preparing for your Work Experience; and additional PD sessions in the winter
- ✓ Participate in additional presentations and workshops, including:
  - LawPro;
  - Intellectual Property with [Reshika Dhir](#) and [Tamara Winegust](#);
  - Ontario e-Discovery Implementation Committee representatives;
  - Clio’s CEO & Founder, Jack Newton, on future success for lawyers;
  - OBA President Karen Perron;
  - LSO Treasurer Teresa Donnelly;
  - Chief Justice George Strathy, QC;
  - Wellness and Emotional Intelligence in the Legal Profession;
  - Alumni Chats on various themes;
  - National Day for Truth and Reconciliation speakers Saga Williams and Ryerson Elder, Joanne Dallaire;
  - Representatives in the legal profession from the Women’s Law Association (WLAO), South Asian Bar Association (SABA), Canadian Association of Black Lawyers (CABL), Federation of Asian Canadian Lawyers (FACL), OBA Equality Committee, OBA Sexual Orientation and Gender Identity Law Section, Canadian Hispanic Bar Association (CHBA), Canadian Italian Advocates Organization (CIAO), Canadian Muslim Lawyers Association (CMLA), Hellenic Canadian Lawyers Association (HCLA)

# SIMULATED CASE FILES – COMPLETED DELIVERABLES

## Administrative Law File (Immigration/Refugee Matter)

- ✓ Conduct Client Interview and make meeting notes
- ✓ Draft Basis of Claim and Review Documentary Disclosure
- ✓ Draft email to client regarding document requirements
- ✓ Research on documents, personal, & country conditions
- ✓ Review and Respond to Urgent Client Message
- ✓ Research and Research Memo
- ✓ Review Transcript of Hearing
- ✓ Prepare for and Present Oral Submissions at Hearing

## Business Law Files (Incorporation and Business Acquisition)

- ✓ Conduct legal research and draft a memorandum on the modernization of corporate law and legal services in Ontario (creating a more welcoming province for business in Ontario, the use of electronic signatures – when and what makes it valid, and resolving vexatious registrations without going to court)
- ✓ Conduct legal research and draft Options memo re Business Structure Options
- ✓ Conduct Client Interview and make meeting notes
- ✓ Review and Analyse Incorporation Documents
- ✓ Review Corporate Profile Reports
- ✓ Draft Letter of Intent
- ✓ Draft Closing Agenda
- ✓ Review Articles of Incorporation
- ✓ Draft Share Purchase Agreement
- ✓ Draft a Non-Competition Agreement
- ✓ Research and Draft Legal Memorandum on Non-Competition Agreements
- ✓ Consider and develop strategy/options for Client
- ✓ Draft Third Party Consents
- ✓ Draft Promissory Note
- ✓ Respond to the urgent telephone message from the Senior Business Partner
- ✓ Prepare single draft closing agenda
- ✓ Review and assess Corporate Minute Book
- ✓ Draft Corporate Ratifying Resolutions
- ✓ Review an Initial Due Diligence Request List

## Civil Litigation Files (Personal Injury File - half of the Cohort represented the Plaintiff; half the Defendant):

- ✓ Conduct a Client Intake Meeting
- ✓ Draft Retainer Agreement and Additional Emails/Letters to the Client
- ✓ Review Correspondence from Other Side
- ✓ Research and prepare a legal memo – current state of the law in relation to the definition of a spouse and cohabitation and the factors involved in determining such
- ✓ Subsequent Client Meetings
- ✓ Create Client Interview Notes
- ✓ Consider and develop strategy/options for Client
- ✓ Prepare for and Conduct Examination for Discovery
- ✓ Draft Statement of Claim or Statement of Defence
- ✓ Review Pleadings of other side
- ✓ Review Affidavit of Documents
- ✓ Review email correspondence or phone message from client and prepare an email response
- ✓ Prepare for and Conduct Examinations for Discovery with Client/Witness

## Criminal Law File (half the cohort represented the Crown; half the Accused)

- ✓ Research and Prepare Memo on the Test on the bail hearing including what the key sections and cases are
- ✓ Prepare for and Conduct New Client Interview
- ✓ Complete Client Interview Notes
- ✓ Prepare a negotiation strategy with an outline to the approach
- ✓ Conduct a negotiation
- ✓ Document the result of the negotiation
- ✓ Prepare for Guilty Plea and Sentencing
- ✓ Conduct Guilty Plea and Sentencing

## Family File (half the cohort represented the Applicant; half the Respondent)

- ✓ Conduct Client Interview and complete/submit notes of meeting
- ✓ Draft Family Pleadings (half drafted an Application; the other half a Response); and review other side's Pleadings
- ✓ Prepare an affidavit in response to or in support of a motion to reinstate parenting time
- ✓ Prepare for and argue the motion
- ✓ Conduct Research on relocating or moving a child after separation or divorce and draft a memo
- ✓ Review Video and Prepare a Reflection Paper on Intimate Partner Violence

## Real Estate File

- ✓ Review video meetings by Jeff Lem about Title Searching in Ontario and Most Common Registration Mistakes
- ✓ Review video meetings by Lawyer Done Deal about drafting and Agreement of Purchase and Sale using OREA forms and RealtiWeb
- ✓ Review the Annotated Residential Agreement of Purchase and Sale
- ✓ Conduct Search of Title through Teraview
- ✓ Professionalism Research on the Implications of Users Sharing their Teraview Personal Security Package (PSP)
- ✓ Prepare Real Estate Purchase Agreement Memo
- ✓ Prepare a Vendors Closing Certificate Review
- ✓ Draft Statement of Funds
- ✓ Review Requisition letter
- ✓ Review other side's answers to requisitions Draft Statement of Funds
- ✓ Draft Statement of Adjustments
- ✓ Review Closing Documents (including Direction re Funds and Title; Undertakings; Statutory Declarations, Mortgage Documents, Acknowledgements, Consents to Act, Document Registration Agreement)
- ✓ Review Title Plus Insurance Policy
- ✓ Review Draft Reporting Letter
- ✓ Prepare Draft Final Invoice
- ✓ Prepare for and Conduct Senior Partner Meeting re Closing Documents

## Wills and Estates File

- ✓ New Client Interview, confirming Representation and Capacity
- ✓ Draft Client Meeting Notes
- ✓ Draft Memo to File
- ✓ Draft email to client
- ✓ Respond to Telephone Message from Beneficiary
- ✓ Draft Power of Attorney for Property
- ✓ Draft Power of Attorney for Personal
- ✓ Draft Will
- ✓ Draft Summary of Steps When Executing the Will
- ✓ Draft Affidavit of Execution
- ✓ Draft Reporting Letter
- ✓ Review Accounts and Draft Final Invoice
- ✓ Respond to Client Concern re Invoice