



# **LAWYER ROSTER PROJECT**

## **Stakeholder's Roundtable**

**Marian V. De Souza, LL.B**  
**Senior Consultant, INTP Consultants Inc.**

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# TODAY'S OBJECTIVES



- BACKGROUND
- PROJECT PLAN
- SURVEY FEEDBACK
- PROCESS OVERVIEW
- DISCUSSION



## **Mission**

***To improve access to justice by increasing the scope and availability of pro bono legal services to Albertans of limited means.***



## **Alberta Justice**

### Identified issues:

1. The increasing number of self-represented parties in court, which slows the court process and places additional demands on judges and other court personnel; and
2. Ensuring access to justice generally, including for those who need, but cannot afford, legal services



## **Lawyer Roster Project**

**“... to conduct a feasibility study examining limited scope retainer programs and roster programs in other jurisdictions and providing recommendations to Alberta Justice on program parameters and mechanics involved in setting up a limited scope roster in Alberta.”**

**Safe Communities Secretariat**



## **GOALS & OBJECTIVES**

*for pro bono and limited scope retainer services*

- Expand and improve delivery of services across Alberta to meet growing demand for access to justice
- Offer a range of legal services based on the needs of Albertans from summary advice and solicitor's work to litigation
- Co-ordinate and support community organizations and community legal clinics to improve the delivery of services
- Facilitate lawyer delivery of key legal services—"no reason not to"
- Promote pro bono and limited scope retainer work in Alberta



## **VISION FOR ROSTER PROGRAM**

- Maintain a database of lawyers who will conduct limited scope retainer services and pro bono legal services
- Serve public need for an end-to-end solution for limited scope retainer and pro bono legal files by identifying legal needs based upon established criteria, matching them with lawyers with relevant expertise and qualifications and by geographical area
- Include guiding principals agreed upon by stakeholders
- Be based upon best-practice policy and procedures
- Include a database and related technology solution to facilitate and manage intake, matching of client/lawyer and reporting requirements
- Include standardized lawyer and client application forms, supporting templates and precedents for ease of access to and delivery of limited scope retainer and pro bono legal services, including continuing and public legal education tools and resources



## **4-PHASE PROJECT PLAN**

### **PHASE**

### **END DATE**

**1. RESEARCH & CONSULTATION**

**OCTOBER 2009**

**2. POLICY DEVELOPMENT**

**NOVEMBER 2009**

**3. PRODUCT DEVELOPMENT**

**JANUARY 2010**

**4. PRODUCT LAUNCH**

**MARCH 2010**



## **PHASE 1 – RESEARCH & CONSULTATION**

### **SUCSESSES**

- Researched, identified and addressed legal and regulatory issues regarding limited scope retainer and related pro bono legal services in Alberta.
- Identified key stakeholders and working team.
- Meetings arranged or conducted with other pro bono law offices across the country to understand existing lawyer roster practices.



## **PHASE 1 – RESEARCH & CONSULTATION**

**...continued**

- Ontario shared process overview and has tentatively agreed to share best practices & IT
- B.C. shared best practices and has agreed to investigate possibility of adopting existing database (if determined to be suitable to meet Alberta roster needs)
- Quebec shared best practices and challenges
- Saskatchewan shared best practices, challenges and on-line access



## **PHASE 1 – RESEARCH & CONSULTATION**

**...continued**

- Alberta Legal Clinics Surveyed
- Almost unanimous agreement on need for roster program
- Needs in terms of practice area identified and prioritized
- Process overview suggestions
- Opportunities and challenges identified
- Roundtable discussion



## **PHASE 2 – POLICY & PROCESS**

- Create guiding principles document and related policy
- Create high-level process overview with documented reasons
- Recommend best-practice IT solution
- Identify program parameters and prioritize practice areas to be served
- Identify parameters of initial launch based upon resources & timeframe
- Initial process recommendation for presentation to Stakeholders  
(Stakeholder's Roundtable end of November)



## **PHASE 3 – PRODUCT DEVELOPMENT**

- Amend process overview depending upon stakeholder feedback
- Create new or adapt/enhance existing database
- Develop intake, matching and reporting requirements
- Draft lawyer and client application forms
- Create supporting precedents and templates for lawyers
- Stakeholders and insurer approval of forms
- Create resources and tools for public
- Create resources and tools for lawyers



## **PHASE 4 – PRODUCT LAUNCH**

- Test software and processes
- Create internal and external training tools
- Train the trainer
- Train internal staff
- Train stakeholders
- Develop launch timetable
- Develop and implement marketing and communication plan
- Create management and reporting guidelines and procedures



## **RECOMMENDED PROCESS OVERVIEW**

**INTAKE** – who will refer? (legal clinics, court services, legal associations, self?) How? (email, fax, on-line, phone, in person), criteria (income, legal issue)?

**LAWYER/FILE MATCHING** – (area of law, geographical area, how, who? Centralized/decentralized? (email/phone)

**LAWYER ROSTER** – recruiting, training, qualification, quality, resources, volunteer recognition

**REPORTING** – what do we need to track, why? How?

**MARKETING** – how to promote this service to community? legal industry?



**THANK YOU**

**QUESTIONS? DISCUSSION**