

Important Information for PBSC Lawyer Supervisors

Thank you for agreeing to be a lawyer supervisor for a PBSC project! PBSC recognizes that your time is extremely valuable, and we appreciate your willingness to work with us to increase access to justice in our community. This tip sheet is meant to provide you with important information about our placements and policies, and your role as a lawyer supervisor.

- **Agreement Form:** Attached to this memo is a Lawyer Agreement Form PBSC asks all lawyer supervisors to sign before commencing supervision of a project. The Form ensures all lawyers are aware of their responsibilities as a PBSC lawyer supervisor, and commit to spending the time and effort necessary to provide a valuable learning opportunity to our students.
- **Training:** All PBSC volunteers must attend a general PBSC training in September that provides an overview of our program and reviews topics such as professionalism & ethics and legal information versus legal advice. First-year students and upper-year students working on legal research projects must also undertake PBSC legal research training. Some projects also require specialized, subject-matter-specific training. We welcome your input regarding additional training you believe would add value to the placement.
- **Timeline:** PBSC students volunteer **approximately 3-5 hours per week, five months of the year: October, November, January, February and March**, for a total of 60-100 hours. Students are not expected to work during exam periods or reading week. All projects need to wrap up by the last week of classes of the winter term. Given this compressed timeline, it is critical that lawyer supervisors provide their feedback promptly, to ensure students will have time to make revisions and move the project along to completion within this brief, five-month window.
- **Work Plan:** Many PBSC projects require work plans, a helpful tool for students and lawyer supervisors. A precedent Work Plan can be found later in this section and on your USB key. Mapping out the timelines and deliverables ensures the workload is well thought out and evenly distributed, that students have benchmarks to meet, and that lawyer supervisors can carve out time in their busy schedules to review assigned work and offer feedback. If you are volunteering on a project that requires the student to develop a work plan, please assist your student in ensuring that it is realistic and appropriate, with a workload that is distributed evenly throughout the academic year. Please do your best to observe the timeline and keep the project moving along at a brisk pace.
- **Working With Your Student:** All PBSC students are trained to conduct themselves with professionalism, and understand that they must answer phone calls and emails promptly, be responsive to requests made by the organization, be punctual, and complete all tasks within the agreed-upon timeframe. In turn, we ask lawyer supervisors to make certain commitments to our students. Generally speaking, we ask you to be responsive and to maintain regular contact with your student(s). Specifically, this includes meeting with the student(s) at least once early in each academic term and at the end of the project; holding all meetings in person, except for projects that are being supervised remotely or where it is not possible for any other reason to meet in person, in which case the lawyer supervisor and volunteer(s)

should communicate over the phone; to be available periodically during the course of the project as reasonably required to answer questions of a legal nature, to provide guidance relevant to the project, and to review and provide feedback on the work product of the PBSC volunteer(s); and to complete in a timely fashion a final evaluation of the student(s).

In a typical PBSC project, you should expect to hear from your student(s) in late September or early October, and we would ask you to plan a meeting in early October and to provide guidance with respect to the development of a work plan (where required), review and approve the work plan by mid-October, review the students' work in November and provide regular feedback as needed throughout the rest of the year.

- **Legal Advice:** PBSC policy prohibits students from offering legal advice. As a general rule, students can provide information on the state of the law and on legal procedures, but cannot answer questions that relate to the particular facts of a client's situation. That being said, we recognize that the line between legal information and advice is not always clear. We also allow that there will be times when our students are in essence serving as a conduit for advice that is being provided by the lawyer supervisor. If you encounter a situation where you are not sure if this line is being crossed, please immediately reach out to your local PBSC chapter.
- **Monitoring:** PBSC aims to ensure that all its projects are running smoothly, and conducts a formal monitoring process once each semester (November and February), in which someone from PBSC speaks with every student, organization supervisor, and lawyer supervisor to ensure to identify and address any issues that come up. Your local PBSC Program Coordinator or another member of the PBSC team will contact you by phone once in November and once in February as part of this process. In order to make this monitoring process effective, it is vital that the monitoring calls take place within the planned time frame. Accordingly, we ask you to promptly return emails attempting to schedule a monitoring call. These calls typically take less than 10 minutes, and it is vitally important that we know whether things are going smoothly on your project. We also ask that you not wait until the monitoring process and notify your local PBSC Office with any concerns which come to your attention regarding the student or the project.
- **Continuing Professional Development:** Every Law Society in Canada has a policy regarding the Continuing Professional Development of lawyers. In some provinces CPD is mandatory and in others it is merely recommended. In some cases supervision of a PBSC placement can count as CPD. While PBSC makes every effort to keep up with the policies of every Law Society, please refer to your province's policy to determine whether your work with our organization counts as part of your CPD.
- **Feedback:** PBSC relies on your feedback to strengthen our program, and report to our funders. In mid-March we will send you a satisfaction survey to fill out. Please be sure to take a moment to complete the survey and provide us with your impressions of our program – we welcome both positive feedback and constructive criticism.

Lawyer Supervisor Agreement

Pro Bono Students Canada (“PBSC”) is a national pro bono student organization with a mandate to provide legal services without charge to organizations and individuals in need across Canada. In furtherance of its mandate, PBSC matches law student volunteers with community organizations, firms, courts and tribunals under the supervision of qualified lawyers. The law student volunteers are not qualified as lawyers, do not have professional liability insurance and are restricted from providing legal advice or otherwise holding themselves out as lawyers or legal professionals.

PBSC respects your privacy. The information on this form is collected and used for the purpose of administering PBSC, which may include the operation and development of PBSC programs through the local and National offices; communication with and reporting to PBSC members, law schools and funders; evaluating our program; and for promoting our program. PBSC will protect the information in accordance with any and all applicable privacy legislation. Any questions can be directed to the local Program Coordinator at 613-562-5800 ext. 3291.

The undersigned acknowledges and agrees as follows:

1. I will act as a supervisor (“Lawyer Supervisor”) of certain law student volunteers (the “PBSC Volunteers”) who will be involved with PBSC projects;
2. I am a lawyer in good standing with the applicable law society in my jurisdiction of practice and, in supervising the PBSC Volunteers, I will comply with the applicable rules of professional conduct governing the supervision of employees and assistants;
3. Periodically during the course of the project, I will be available as reasonably required to answer questions of a legal nature, to provide guidance relevant to the project, and to review and provide feedback on the work product of the PBSC Volunteers;
4. Without limiting the above, I will (i) review and provide feedback on the proposed project timeline upon the commencement of the project; (ii) review and sign off on the work plan for the project, where one is required [Note: The PBSC Volunteers must submit a draft work plan for review by November 1st at the latest]; and (iii) be available to the PBSC Volunteers at least once during each academic term of the project and upon completion or termination of the project;
5. I will notify PBSC promptly of any concerns that come to my attention regarding the PBSC Volunteers or the applicable project;
6. I agree to make myself available once per semester to provide feedback about the progress of the project. These monitoring reports will take place during the months of November and February. I understand the importance of providing this feedback and I will prioritize these meetings;
7. I will not ask PBSC nor the PBSC Volunteers to incur any costs as part of the placement, including but not limited to photocopying and printing;
8. I will complete an electronic satisfaction survey when it is emailed to me in March, evaluating my experience as a Lawyer Supervisor; and

9. I currently have and will maintain in good standing throughout the time I am a Lawyer Supervisor, appropriate professional liability insurance that extends to my role as Lawyer Supervisor;
10. I will take ultimate responsibility for any final work product submitted to me by PBSC volunteers pursuant to the project.

DATED as of the _____ day of _____, 2019.

Name of Lawyer Supervisor (please print)

Signature of Lawyer Supervisor