

Student Guide

Pilot 2019-2020

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Table of Contents

Pilot 2019-2020.....	1
Introduction.....	5
Admission Requirements.....	5
Admission to the Bar.....	5
Admission to the PREP.....	5
Program Agreement.....	6
Conduct in PREP.....	6
Program Overview.....	6
The Mind of a CPLED-Trained Lawyer – CPLED’s Competency Framework.....	6
Lawyer Skills – What a Lawyer Does.....	7
Practice and Self-Management – How a Lawyer Practises.....	7
Professional Ethics and Character – Who a Lawyer Is and How a Lawyer Behaves.....	8
PREP Structure.....	8
Student Assessment – A Progression of Learning.....	9
Foundation Modules.....	9
Foundation Modules – Completion and Assessments.....	13
Foundation Workshops.....	15
Foundation Workshops – Completion and Assessments.....	15
Virtual Law Firm.....	16
Virtual Firm - Completion and Assessments.....	16
Capstone.....	17
Capstone - Completion and Assessments.....	17
Procertas Legal Technology Assessment.....	19
Pilot Program: Additional Requirements.....	19
Technical Requirements.....	19
Facilitators, Assessors, Practice Managers, & Other Roles.....	20
Foundation Module Facilitators.....	21
Foundation Workshops & Capstone Assessment Facilitators.....	21
Foundation Workshops and Capstone Assessment Coordinators.....	21
Virtual Firm Assessors.....	21
Sim Clients.....	22



Practice Readiness Education Program

Practice Managers	22
Statement of Grades	22
Policies	22
1. Appealing a decision in the CPLED Program	23
2. Suspension or Expulsion	23
3. CPLED Materials and Work Product.....	23
a. Proprietary Content	23
b. Student Work Product	23
c. Instructions and Protocols	24
4. Late or Incomplete Submissions.....	24
5. Collaboration	24
6. Information and Privacy	24
a. General Collection, Use, and Disclosure of Personal Information	24
b. Student Contact Information	25
c. Student Communication Through D2L.....	25
d. Recording.....	25
e. Exchange of Information with Law Societies.....	26
f. Exchange of Information with Principals	26
g. Other Collection, Use, and Disclosure	26
7. Accessibility and Special Circumstances	26
a. Accessibility.....	26
b. Accommodation.....	27
c. Absences	28
d. Deferral	28
e. Withdrawals.....	29
Student Concerns	29
Student Assistance.....	29
Student Support: Contact Information	30
Appendix A: Practice Readiness Education Program (PREP) Student Agreement	32
Appendix B: Professional Integrity Policy	34
Appendix C: PREP Schedule	35
Orientation Session.....	35
Foundation Modules	35
Foundation Workshops	35



Practice Readiness Education Program

Virtual Firm	35
Capstone Assessments	36
Procertas LTA	36
Appendix D: Sample Assessment Criteria	37
Interviewing Assessment Criteria	37
Appendix E: Application Forms	40
APPLICATION FOR AN EXCUSED ABSENCE	41
INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR AN EXCUSED ABSENCE	42
General Information	42
Instructions for Completing an Application for an Excused Absence	42
APPLICATION FOR A DEFERRAL.....	43
INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR A DEFERRAL.....	44
General Information	44
Instructions for Completing an Application for a Deferral.....	44
APPLICATION TO WITHDRAW	46
INSTRUCTIONS FOR COMPLETING AN APPLICATION TO WITHDRAW	47
General Information	47
Instructions for Completing an Application to Withdraw.....	47

Introduction

This Student Guide is designed to help students (and their principals) know what to expect in the Practice Readiness Education Program (PREP), including some important rules. The information contained in this Guide is intended to supplement the following key documents (with which students should be familiar):

- the Legal Profession Act, and
- the Rules of the Law Society of which the student is registered as an articling student.

This Guide is not intended to override the rules, policies, or procedures of the Law Society. To the extent that any of the above sources deviate from what is in this Guide (now or in the future), those sources govern. For questions about the information contained in this Guide, please contact CPLED at admin@CPLED.ca. This Guide and the policies and procedures referred to in it may be changed or updated from time to time.

Admission Requirements

Admission to the Bar

Students seeking admission to the Bar must successfully complete PREP. Completion requires attendance, participation, professional behaviour, academic integrity, and successful completion of all assignments and assessments.

Along with the experience of articling, PREP is intended to help students develop the competencies required of an entry-level lawyer and ensure that students can demonstrate these competencies before being admitted to the practice of law.

The following entities play important roles in the delivery of PREP:

- The Law Societies of **Alberta, Saskatchewan and Manitoba** regulate the legal profession in these jurisdictions. They administer applications for admission as an articling student, set articling requirements, and establish the Rules for Bar admission. The Law Society of Alberta requires students to successfully complete PREP in order to be enrolled as a Law Society member.
- The Canadian Centre for Professional Legal Education (CPLED) sets the competency framework, curriculum, and assessment standards for the harmonized professional licensing (Bar Admission) program in Alberta, Saskatchewan, and Manitoba.

Admission to the PREP

Admission requirements into the PREP Pilot include the following:

1. Articling student status confirmation,
2. PREP application approval,
3. Principal approval for student to participate in the pilot program,
4. Student Agreement sign-off, and
5. Payment of tuition fees set at \$1,532 + GST.



Practice Readiness Education Program

Program Agreement

To be admitted into PREP, an applicant must agree to certain terms and conditions as set out in the PREP Student Agreement (see Appendix A: Practice Readiness Education Program (PREP) Student Agreement). By signing this agreement, the applicant agrees, among other things, to be bound by the CPLED Professional Integrity Policy (see Appendix B: Professional Integrity Policy).

Conduct in PREP

Students in PREP are expected to maintain the highest standards of integrity.

PREP is a critical element of the qualification process and as such, it depends on the integrity of each student. Students must conduct themselves with professional and academic integrity; this is required for successful completion of PREP.

Students are expected to maintain the highest standards of integrity in meeting PREP requirements, including full compliance with the *CPLED Professional Integrity Policy* (see Appendix B: Professional Integrity Policy) and with the law society's code of conduct.

Breaches of professional integrity, including plagiarism, are not tolerated by CPLED and may result in an investigation, suspension, failure in the program and disciplinary action by CPLED, or referral to the Law Society for investigation and disciplinary action.

Students with questions about whether a particular conduct could trigger a breach of the CPLED Professional Integrity Policy should contact CPLED at admin@CPLED.ca.

Students with questions about whether a particular conduct could trigger a general breach of the lawyer's Code of Conduct should consult, on a confidential basis, with an advisor at their respective law society.

Program Overview

The Mind of a CPLED-Trained Lawyer – CPLED's Competency Framework

To be called to the Bar, students require more than knowledge of the law; students must demonstrate that they have the competencies, skills, and character to practice law to the highest standard.

New lawyers need to have the communication skills and understanding of how to practice law, as well as the empathy, compassion, integrity, respect, ethical practice and commitment to diversity to serve the public and their clients effectively.

As a part of the redesign of the Bar admission course for students, CPLED developed a new Competency Framework to establish the basis for the program and to guide students, instructors, and assessors in understanding the specific skills and abilities the PREP will help Bar-called lawyers develop over their articling period.

The CPLED Competency Framework focuses on the whole lawyer – what a lawyer does, how a lawyer practises, who a lawyer is and how a lawyer behaves.

Lawyer Skills – What a Lawyer Does

From that first client meeting to closing the file, Bar-called lawyers must demonstrate that they can take a legal matter from start to finish through understanding their client's unique situation, researching and analyzing potential options, executing a solution, and managing all the administrative and client management matters along the way. This takes more than knowledge of the law; it takes organization and discipline.

It also requires lawyers to communicate clearly with clients, the courts, colleagues and other stakeholders. Communication is more than plain language, or a well-crafted brief – it is about understanding your audience, showing empathy, communicating across different channels and making sure your message is understood, while taking care to listen.

Practice and Self-Management – How a Lawyer Practises

Understanding how a legal practice works – from managing risk, to quality control, to the operation of trusts and billing – are all key competencies for new lawyers. All of this comes with demands to understand the technology tools used in today's legal environment while keeping an eye on the trends that will shape that environment in the years ahead.

The CPLED Competency Framework is built to help students understand how a practice works, and how their work within a practice contributes to their success. From time management and project management, to managing relationships and files in a professional manner, students will learn how to be lawyers who are effective and efficient in their practice. A focus on self-awareness, empathy and resilience will help students balance their personal life with their workload.

Professional Ethics and Character – Who a Lawyer Is and How a Lawyer Behaves

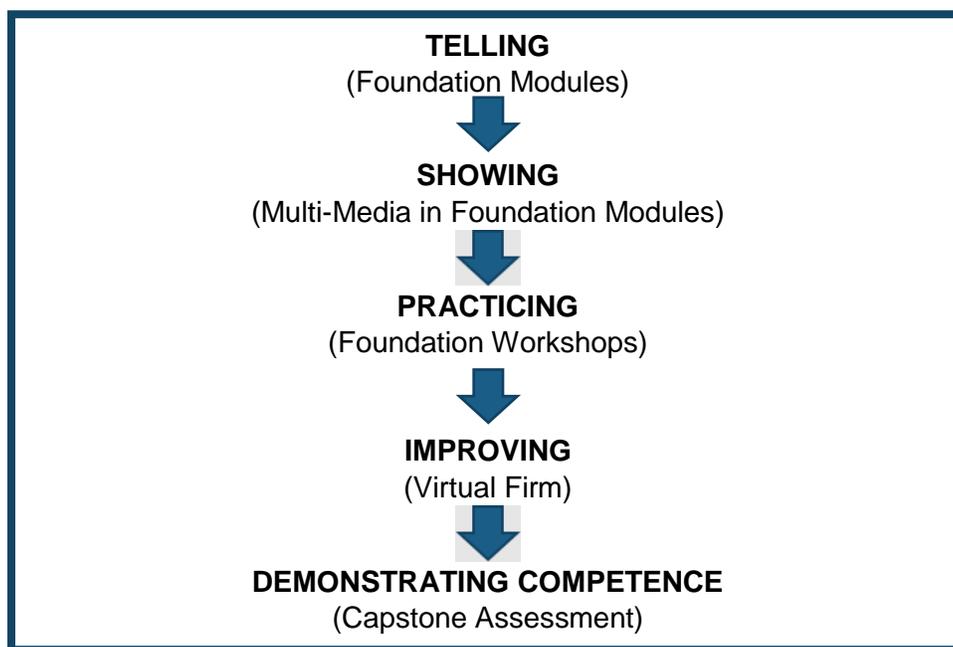
Legal practice is about much more than knowing the law – it is also about acting to preserve the critical role of justice in our society. Earning the trust of your clients, colleagues and the public requires a life-long commitment to ethics, integrity, and fairness in all that you do.

CPLED's Competency Framework prepares students by going beyond the ethical obligations outlined in the code of conduct to understanding the qualities and characteristics lawyers must embody to ensure that decision making is guided by ethics and integrity.

Please visit [CPLED's website](https://cpled.ca/about-cpled/competency-framework/) (https://cpled.ca/about-cpled/competency-framework/) for more information on CPLED's Competency Framework.

PREP Structure

PREP consists of four phases where students develop the competencies required to be admitted to the bar as an entry-level lawyer. The progression of PREP moves from:



Students must successfully complete all four phases to complete PREP. Students are expected to complete all requirements within one PREP year (see Appendix C: PREP Schedule). All requirements for successful completion of PREP must be met within the two-year period immediately preceding enrollment as an articling student (unless a longer period is approved).



Practice Readiness Education Program

Student Assessment – A Progression of Learning

To help students attain the required knowledge, competences, values and attitudes, a distinctive assessment methodology has been adopted where the learning zone is also used as the assessment zone. PREP’s assessment design accommodates a variety of assessment types throughout the program so student achievement can be identified and verified. When performance does not meet standards, there are opportunities for reflection, feedback, and improvement.

PREP is a skills-based curriculum and includes an evaluation model that sets competence levels and scores against standards for entry-level lawyers set in the domains of skills, knowledge, and ethics.

Learning is cumulative in PREP, as each phase prepares students for activities in the next phase of the program as the exercises become more advanced. This method allows for a number of passes through PREP material with increasing complexity and enables different skills to be taught at the same time in an overlapping learning process. Moving through increasingly complex transactions and tasks, students gain skills and proficiency reinforced through collaboration with peers and instructors, their own reflection, and relevant professional assessment at every stage of the program.

Foundation Modules

The first phase of PREP consists of an Orientation and twelve online modules. The Orientation is a one-day face-to-face session where students are given an overview of PREP and information about technical requirements, assessments, support and expectations. The online modules combine self-directed study and interactive assessments with multimedia learning to provide a foundation in all CPLED competencies.

Through the online modules, students will have an opportunity to develop and assess their skills and build a strong foundation from which to tackle increasing complexity as students progress through the program. The following section provides an overview of the Foundation Modules.

How a Lawyer Behaves and Who a Lawyer Is

Professional Ethics and Character

Professional ethics and character are simply the foundation to a successful legal practice. Whether a student is in private practice, public practice, or in-house counsel, professional ethics and character are critical to the student’s identity as a lawyer. In this module, students look at ethics and character as competencies and the building blocks to their legal career before focusing on professional ethics and character in three separate settings: professional ethics and character in the office; professional ethics and character in the profession; and, professional ethics and character in the community.

Indigenous Law, Cultures and People

In order to represent and work with Indigenous peoples, it is important for lawyers to understand their worldview, culture and history. Indigenous peoples represent a vast range of cultures and perspectives and this module aims to pique a student's interest to learn more about representing an Indigenous client, Indigenous land claims, or working with Indigenous colleagues.

What a Lawyer Does

Oral Communication: Client Relationship Management

Effective oral communication is essential to legal practice. This module focuses on oral communication skills specific to interviewing, negotiating, and engaging in oral advocacy. General communication skills form the backbone for each of these legal competencies. Students will first examine the components of effective communication, the need for effective cross-cultural communication, and how to employ those communication skills to successfully manage client relationships.

Oral Communication: Interviewing

Interviewing is an integral part of a lawyer's practice. Whether students are performing an initial client interview, preparing witnesses or experts, or dealing with colleagues, solid interviewing skills, routinely applied and practiced, will bring ease and efficiency to students' work. In this module, students will learn to use a structured interview approach when interviewing a client and learn how to put clients at ease throughout the interview, acknowledging their feelings, and conveying a desire to help.

Oral Communication: Negotiating

Concluding an acquisition agreement, trying to settle a personal injury claim, or conferring with a client about pending legal matters – all these situations require negotiation. Lawyers who cannot effectively negotiate cannot effectively practice law. In this module, students will be introduced to negotiation principles, processes, and preparation guidance to obtain and deliver the best results for their clients. It is a learned skill that students will continue to develop throughout their professional life.

Oral Communication: Advocacy

Oral advocacy is critical to effective oral communication and central to the skillset students must develop as a lawyer. Whether students are discussing matters within their law firm or law office, negotiating a settlement or resolution with counsel opposite, acting on behalf of a client on an application or motion, or representing a client at the trial or appellate level, strong oral advocacy is essential. In this module, students will learn about the importance of oral communication and advocacy, advocacy in applications and motions, and advocacy at trial.

Legal Research, Fact Gathering and Case Management

Clients do not come to their lawyer with clearly laid out legal issues. They come to their lawyer with a problem or a goal and expect their lawyer to apply knowledge and judgment to help. To do that, lawyers engage in fact-gathering, legal research, and case management. These all form part of the process of providing solutions to clients. In this module, students will cover the following topics: fact gathering, legal research, case management and trial preparation in order to effectively solve problems for clients.

Written Communication: Legal Writing

Communication skills are critically important to lawyers in all areas of practice. A poorly written or drafted document is not only a reflection on the competency of the lawyer who created it but may be the foundation for a potential lawsuit. Litigators, too, are judged by the quality of their writing. In this module, students will review the basics of legal writing, and how to write an opinion letter, an advocacy letter, and a retainer agreement.

Written Communication: Legal Drafting

In this module, students will be introduced to drafting, which is a specialized form of writing. Lawyers need drafting skills regardless of the area in which they practice law as they create contracts, wills, settlement agreements, orders, affidavits, motions, pleadings, offers, and other documents every day. Students will learn how to identify and consider the direct and potential audiences of the communication.

Students will learn to adapt communication appropriately in recognition of diverse backgrounds and the needs and sensitivities arising from an individual's circumstances. Students will explore the concept of using plain language and a tone consistent with the formality of the context. Finally, students will be taught how to draft accurate and legally enforceable documents, whether contentious or non-contentious.

How a Lawyer Practices

Technology Skills and Tools for Lawyers

As the use of technology increases in law practices, it is important for lawyers to have the technical skills to meet the business needs for the current legal market and to be aware of how technology can impact the practice of law. In this module, students will learn the importance of developing competence in the basic office technology schools. Students will also learn the professional rules that should be considered with the use of technology and how technology can be used to help manage risk within a law firm (e.g., cybersecurity).

Practice Management and Trust Accounting

While the practice of law is a profession, and as lawyers, students are held to high standards of responsibility and ethics, it is also a business, which students expect will provide them with a reasonable standard of living. The fact is, only a small percentage of claims against lawyers relate to substantive knowledge. The primary area of claims relates to lack of communication and inadequate investigation, many of which relate to lack of time and matter management. Practice management is a key element to becoming a successful lawyer. Lawyers must attend to the business aspects and rules of their practices from the appropriate management of the day-to-day activities of the practice, to competent financial management, including trust accounting. This module will deal with the breadth of these topics.

The Effective Lawyer

Reports, studies, and testimonials demonstrate that success as a lawyer depends not only on lawyer skills, but also on personal attributes and skills. The purpose of this module is to provide students with an opportunity to focus on themselves as a person and provide guidance and tools to support students in meeting the demands of their professional and personal life, as well as to develop and maintain productive and healthy relationships with colleagues and clients.

Multi-Media Learning

Legal Skills in Action

After completing the legal skills modules, students will work through a multimedia educational experience that will involve two different legal matters. It will feature actual lawyers interviewing, negotiating, and advocating, both well and not so well. Students will be involved in writing and drafting documents as well as legal research.

Practice Management Skills in Action

After completing the practice management and technology modules, students will work through a real estate purchase and sale and learn how to set up and manage client trust accounts and how to avoid and manage risk in a law firm. The student will also be shown how to use practice management software to help manage client and financial matters as well as risk within a firm.

In both multimedia segments, students will complete assignments that will be revisited during the Foundation Workshops.

Foundation Modules – Completion and Assessments

Students must demonstrate engagement, professionalism and competency to successfully complete each phase of PREP.

1. Engagement: attendance, punctuality, participation, peer assessment.
2. Professionalism: demonstration of professional ethics in completion of assignments, academic integrity, respectful dealings with fellow students, facilitators, assessors and staff.
3. Competency demonstration: successful completion of all mandatory quizzes, assignments and assessments.

Orientation Session – Engagement and Professionalism

Student engagement and professionalism include the following:

- Mandatory attendance: students should plan to be away from work for the entire day as noted on the schedule (Appendix C: PREP Schedule). Students are expected to sign in and sign out.
- Punctuality: students are expected to arrive on time.
- Respectful and professional behavior:
 - being prepared to participate by completing all pre-work and homework (it will take approximately 1 to 2 hours per day to complete assigned homework)
 - providing full attention while in the session
 - turning off phones and other devices, unless they are used to access instructional content.
- Appropriate attire: students are expected to wear business attire (e.g. suits).

Foundation Modules – Engagement, Professionalism and Competency Demonstration

1. Engagement – Completing Modules in a Timely Manner

The twelve content modules and multi-media will focus on *learning outcomes* tied to associated competencies. Each module is comprised of:

- Readings (required & optional)
- Videos
- Activities
- Reflections
- Summative quiz (must pass to proceed)
- Surveys (must complete to proceed)

It will take approximately 106 hours to complete all Foundation Modules readings, activities, and quizzes. Some modules will take longer than others to complete (see Appendix C: PREP Schedule).

Students must successfully complete a module (i.e. complete readings and activities, pass the quiz and complete the module survey) by the deadline date as per the Foundation Modules schedule (Appendix C: PREP Schedule). Students must notify the office (admin@cpled.ca) if they are not able to meet a deadline and explain why.

If a student misses a deadline:

- First missed deadline: on the day after the missed deadline the student will receive a notification from D2L alerting them of the missed deadline. The student will prepare an action plan addressing how the student plans to catch up from the missed deadline and how the student plans to meet remaining deadlines for Foundation Modules. The student will upload this action plan in the Dropbox in D2L within 24 hours of receiving the missed deadline notification.
- Second missed deadline: the student's principal will be contacted to arrange a joint action plan between the student, principal and CPLED.
- Third missed deadline: the student may be withdrawn from PREP.

2. *Professionalism*

The student's principal and Law Society may be notified if a student fails to conduct themselves with professional and academic integrity (see Appendix B: Professional Integrity Policy).

3. *Competency Demonstration – Assessments*

Formative assessments appear throughout the Foundation Modules. These assessments are short, and they are there to help students identify areas where they might need to go back and review. Formative assessments are embedded in the online learning environment and include multimedia activities, opportunities for reflection and online quizzes. Student performance on formative assessments does not form part of the student's licensing assessment in the PREP.

Summative assessments appear at the end of each module (a quiz that consists of 30 multiple choice questions). These quizzes help to ensure students understand the basics before they move through PREP. To continue to move through the program, students must master the content covered in each Foundation Module.

If a student fails a quiz:

- 1st failed quiz in a module – student completes a checklist that outlines how to prepare for the 2nd attempt (2nd quiz automatically released)
- 2nd failed quiz - student completes a checklist and sends an email message to the CPLED office at 3rdAttempt@cpled.desire2learn.com informing the office of the second failed quiz and completion of the checklist.
- 3rd failed quiz - student continues through the rest of the modules/quizzes but must write a 60 question multi-topic exam before proceeding to Foundation Workshops.

Students have one hour to complete the quiz and students must complete quizzes by 11:59 p.m. MST of the module due date. Students are encouraged to complete their quizzes well in advance of the due date. Quiz answers are not disclosed after the quiz has been submitted.

Module quizzes do not form part of a student's licensing assessment in PREP, but the student must successfully complete each quiz before progressing to the next phase of PREP.

The Effective Lawyer module differs a little from the other Foundation Modules. In addition to readings and videos, students will complete self-assessments and do reflective work. There is **no quiz** at the end of this module, but students will prepare a **Personal Code of Conduct**.

The Foundation Modules are meant to give students the information they need to proceed throughout the later phases of the program where they will practice and eventually demonstrate the skills required of an entry-level lawyer.

Students must complete the Foundation Modules to proceed to the Foundation Workshops.

Foundation Workshops

During the Foundation Workshops, students will come together for five days to interact with fellow students and facilitators in a variety of workshops that include role-playing and peer assessment in the areas of interviewing, negotiating, and advocacy. Students will also participate in simulations and practice management.

At the Foundation Workshops, the focus is on integrating knowledge and skills development in social environments, obtaining feedback from peers and experienced lawyers, and applying the learnings from the Foundation Modules. The workshops will prepare students to effectively and independently manage a matter during the next phase of PREP.

Foundation Workshops – Completion and Assessments

The workshops provide students with an opportunity to practice skills through scenarios, practice and reflection. Students will be evaluated on:

- Completing all pre-work and homework
- Attending the full 5-day in-person sessions and actively participating

1. *Engagement and Professionalism*

- Mandatory attendance: students should plan to be away from work for the entire day as noted on the schedule (see Appendix C: PREP Schedule). Students are expected to sign in and sign out.
- Punctuality: students are expected to arrive on time.
- Respectful and professional behavior:
 - being prepared to participate by completing all pre-work and homework (it will take approximately 1 to 2 hours per day to complete assigned homework)
 - providing full attention while in the session
 - turning off phones and other devices, unless they are used to access instructional content.
- Appropriate attire: students are expected to wear business attire (e.g. suits).

Concerns related to the above will be shared with the student's practice manager and/or principal.

Involvement in other work, regardless of its nature, is not adequate reason for non-attendance, failure to participate, or failure to satisfactorily complete PREP Foundation Workshops requirements. Students should not schedule work meetings, court appearances, or other work-related activities during this time.

2. *Competency Demonstration*

Competencies will not be evaluated during the workshops; however, students will have the opportunity to practice their competencies throughout the workshops.

Students must attend the Foundation Workshops to proceed to the Virtual Firm.

Virtual Law Firm

Returning to the online environment, students will put their foundational training to the test, working as lawyers in a virtual law firm, managing the full lifecycle of cases in business law, criminal law, family law, and real estate.

These transactions include interviewing simulated clients within a learning management system to allow assessors with practice area expertise, and practice managers to assess students' skills, knowledge, and progress as they complete each task. Students will also receive coaching and mentoring from a practice manager for the duration of the practice rotations.

Virtual Firm - Completion and Assessments

In this phase, students work on realistic entry-level cases or matters. Simulated clients enact as clients and assess the student and provide contextual feedback using a rubric. Students will



upload several assignments for each case/matter covering a breadth of competencies including practice management, trust accounting, etc.

1. *Engagement and Professionalism*

Students have **two weeks at the start of each simulation to work through the case/matter**. If a student is unsuccessful, the student will be given one week to complete requested revisions and rework and reflect on performance with a practice manager before moving to the next rotation.

Students must also organize interviews with simulated clients and complete reflections on each practice rotation in a timely manner. They are required to participate in meetings with their practice manager (see the section titled Facilitators, Assessors, Practice Managers below for an overview of the role and responsibilities of practice managers).

2. *Competency Demonstration*

Assessors will use rubrics to evaluate student assignments. The assessment criteria is as follows with a sample provided in Appendix D: Sample Assessment Criteria.

NA	No competence demonstrated
NC	Nominal competence demonstrated
RC	Reaching entry-level competence
EC	Entry-level competence
CL	Competent practicing lawyer

Students must complete the Virtual Firm to proceed to the Capstone Assessment.

Capstone

In this final assessment, students will demonstrate their skills and competencies in one final simulated transaction. Students will complete tasks that span the full lifecycle of a case and demonstrate their competence in decision-making, provide their client with ethical and professional representation and use the appropriate case management and technical tools to guide their work. Finally, students will submit a final reflection on the entire program.

The program builds on each prior stage, building in complexity and requiring students to develop competencies through tasks that assess not just their knowledge, but how they apply their lawyer and practice management skills and demonstrate professionalism, ethics, and values.

Capstone - Completion and Assessments

The Capstone Assessment is a five-day in-person session. At the Capstone Assessment, students will work through another simulated matter similar to the ones in the Virtual Firm, but the work associated with the case/matter will predominantly be performed in person. Students will be required to reflect on their entire PREP experience and submit a report reflecting their learnings along with professional development plans post Bar-Admission to address areas that require additional competency development.

Students must actively participate, complete all assignments, submissions (legal writing, drafting, research) and summative PREP reflection.

1. *Engagement and Professionalism*

- Mandatory attendance: students should plan to be away from work for the entire day as noted on the schedule (see Appendix C: PREP Schedule). Students are expected to sign in and sign out.
- Punctuality: students are expected to arrive on time.
- Respectful and professional behavior:
 - being prepared to participate by completing all pre-work and reading
 - providing full attention while in the session
 - turning off phones and other devices, unless they are used to access instructional content.
- Appropriate attire: students are expected to wear business attire (e.g. suits).

Concerns related to the above will be shared with the student's practice manager and/or principal.

Involvement in other work, regardless of its nature, is not adequate reason for non-attendance, failure to participate, or failure to satisfactorily complete PREP Foundation Workshops requirements. Students should not schedule work meetings, court appearances, or other work-related activities during this time.

2. *Competency Demonstration*

The is the Phase of the program where entry-level competence for bar admission will be assessed. Ethical issues and professionalism will be integrated into the matter/case.

Assessments will take place as follows:

Assessment Described	Assessors Described
Interviewing	Simulated client (in-person)
Negotiating	Lawyer assessor (in-person)
Advocacy	Lawyer assessor (in-person)
Legal Writing, Drafting, Research	Uploaded to D2L, marked remotely
Practice Management skills	Marked remotely
PREP Reflection and CPD Plan	Marked remotely

A sample of an assessment criteria is provided in Appendix D: Sample Assessment Criteria.

Procertas Legal Technology Assessment

The Procertas Legal Technology Assessment (LTA) is a benchmarking and training platform to assess skills and provide training to improve the quality of work in Word, Excel and PDF.

A short video describing the Procertas assessment can be accessed at the following: <https://vimeo.com/346202302/4da2214fad>. Students will receive a welcome email message directly from Procertas with login information. Students must complete the LTA by April 30, 2020 and earn **qualified** or **expert** certification in:

- Word and
- Excel or PDF

The time to complete each of the above depends on the student's proficiency level at the beginning of the program. Estimated completion time per software program is approximately 2 to 4 hours.

Pilot Program: Additional Requirements

In addition to the above, to continuously improve PREP, students in the pilot program are expected to:

- Complete a survey at the end of each module
- Report errata in the D2L Discussion Board
 - Typos/grammar
 - Technical glitches in activities or viewing
- Provide constructive feedback on content
- Reach out to facilitators, practice managers and staff for support as required.

Technical Requirements

The PREP is hosted by Desire2Learn (D2L) and it is accessible on a desktop or laptop, tablet or mobile phone. While this enables students to access PREP anytime and anywhere, *for an optimal experience, students are encouraged to use a computer to complete interactive activities, quizzes and assignments.* Whatever platform is used, it must have a webcam and microphone.

Students will access PREP course materials (reading materials, videos, quizzes, etc.) through D2L at <https://cpled.desire2learn.com/d2l/login>. Students will receive their unique login names and passwords by email.

D2L Technical Requirements

- ✓ Operating System: Windows 10 or Apple iOS latest version

D2L Technical Requirements

- ✓ The supported browsers are **Chrome** and **Firefox**. Students **must use one of those two browsers** for FULL functionality in the learning environment. The Internet browser must be up to date (installed or updated within the last month).
- ✓ Enable browser's JavaScript and Cookies
- ✓ Install Adobe Flash Player 10.1 or greater for desktop systems
- ✓ **Reliable high-speed internet** when using D2L with recommended connection speeds at least 50 Mbps for downloads and 10 Mbps for uploads. TEST connection speed at <https://www.speedtest.net/>.

PREP Course Tools and Resources

- ✓ Dropbox for assignment submission
- ✓ 3rd party education partners:
 - LexisNexis: QuickLaw and Practice Advisor (computer-assisted legal research)
 - Clio (legal practice management software)
 - Procertas (technology training)
- ✓ PREP Library (Learning Object Repository)
- ✓ MyPortfolio is the student's personal and private space to track competency development. It is a tool for storing, organizing, reflecting on and sharing items that represent the student's learning. Students can include items such as documents, graphics, audio files, videos, presentations and course work in their portfolio. Students can share items with others (such as the student's Practice Manager) by giving them permission to view items, edit items, see or add comments, and see or add assessments to receive feedback.
- ✓ Bongo for video assignments and the virtual classroom. When using Bongo, Chrome is preferred and will provide the best experience.
- ✓ **Reliable high-speed internet** when using D2L with recommended connection speeds at least 50 Mbps for downloads and 10 Mbps for uploads. TEST connection speed at <https://www.speedtest.net/>.

For additional information on supported platforms and browsers see [D2L Help – Browser Support](#) and [Bongo – Basic System Requirements](#).

Facilitators, Assessors, Practice Managers, & Other Roles

PREP instructors include highly respected members of the legal community. Program instructors include:

- Facilitators for Foundation Workshops and Capstone Assessments
- Assessors who evaluate assignments
- Practice Managers who provide guidance and mentorship



Practice Readiness Education Program

Other key support personnel includes:

- Sim clients who assess interview skills
- Coordinators who provide administrative support

All assessors have training on the assessment criteria for each assessment opportunity so that all students are assessed consistently and fairly.

Foundation Module Facilitators

The role of the Foundation Module Facilitator (MF) is to provide clarity to students who are experiencing content questions or difficulty. MFs provides students with support through the D2L discussion board.

Foundation Workshops & Capstone Assessment Facilitators

Workshop Facilitators (WF) guide group discussions during the Foundation Workshops and Capstone Assessment. The WF provides oversight to students and encourages participation and engagement in small and large group discussions. Facilitators provide students with overall feedback on competencies, behaviour, and engagement. If needed, facilitators will also contact the student's Practice Manager to bring attention to issues or concern so that Practice Manager can follow up with the student.

Foundation Workshops and Capstone Assessment Coordinators

Administrative support is available at all face-to-face sessions. Workshop Coordinators (WC) will take attendance and address administrative issues during the Foundation Workshops and Capstone Assessment.

Virtual Firm Assessors

The Virtual Firm Assessor (Business Law Assessor, Criminal Law Assessor, Family Law Assessor, Real Estate Assessor) is a lawyer who is experienced in a practice area and within the jurisdiction of the students to which he/she is assigned during the Virtual Firm practice rotations.

The matter simulations will require students to manage a matter from inception to finalization and the tasks produced throughout that process will be assessed by the assessor for that practice area. The tasks will be uploaded to D2L for on-line plagiarism checking and each of the assigned elements will be assessed against an approved rubric for each task using a competency-based assessment rubric. Assessors will be trained on the rubrics, and consistency papers will be marked before marking live student responses.

Developmental feedback will be provided to students on their performance on each of the matter deliverables. These deliverables may take the form of students videotaping themselves



Practice Readiness Education Program

(e.g., advocacy), videotaping a negotiation with a fellow student, draft documents, legal writing, research, among others.

Sim Clients

Students will have opportunities to practice, be assessed and develop competence in client interviewing in the Virtual Firm rotations (through video interview) and in the Capstone Assessment (through a face-to-face interview). These will be assessed by a trained Simulated Client using a standardized competency-based rubric.

Practice Managers

The Practice Manager (PM) will coach and mentor students as they go through the Virtual Firm simulations. PMs will review the student's portfolio, the student's assessments from their assignments (PMs do not assess assignments - they are only looking at the results) and then PMs will spend ~½ hour on a video call with each student answering questions, providing advice and helping students develop an action plan to move towards entry-level competence.

The PM will also be an assessor in the area of Practice Management (quality and completeness of their Clio updates), self-management (time management, interpersonal skills, etc.), and help students reflect on their performance throughout each of the virtual firm rotations and the program to date.

Statement of Grades

The official record of a student's performance in PREP is the Statement of Grades. The Statement of Grades indicates whether the student has demonstrated entry-level competence during the Capstone Assessment.

This Statement of Grades is prepared by CPLED after the Capstone Assessment is completed. These are then sent to the student and the student's Law Society. The Statement of Grades are processed as expeditiously as possible, but processing may take several weeks.

Policies

To maintain the integrity of the assessment process and to ensure a level playing field for all students, CPLED consistently applies a clear set of policies. Students should familiarize themselves with these policies.

The Student Guide will highlight where a policy may be different for students because of differences in the Rules of the Law Societies of Alberta, Saskatchewan and Manitoba.

- Rules of the Law Society of Manitoba
- Rules of the Law Society of Saskatchewan
- Rules of the Law Society of Alberta

1. Appealing a decision in the CPLED Program

In some circumstances, a student has a right to appeal a decision. A student may appeal only:

- a requirement to repeat the entire PREP,
- a suspension or expulsion from the PREP,
- a denial of admission to the PREP, or
- an inability to repeat the PREP due to the number of past attempts, where the student has made no more than two attempts.

2. Suspension or Expulsion

Where CPLED concludes that a student has behaved unprofessionally, without academic integrity, or without professional integrity, the Operations Manager of CPLED may take appropriate action. This includes, without limitation, expulsion from PREP and/or a failed standing in all or part of PREP. The Operations Manager shall advise the student's Law Society of the conduct in question and the action taken as a result. There is a right of appeal of this decision.

The Operations Manager may provide, and upon a request from the Executive Director of the Law Society, shall provide the Executive Director with evidence relevant to a breach of the requirements of professional behaviour, professional integrity, and academic integrity.

3. CPLED Materials and Work Product

Students in the PREP are expected to abide by policies governing the materials and resources to which they are provided access. Students are also expected to abide by policies related to the work they produce in the PREP.

a. Proprietary Content

PREP materials provided to students are proprietary. Module content and materials are for student use only.

b. Student Work Product

Students are responsible for any work they produce as a result of participating in the CPLED Program. Students cannot lend, give, or sell their PREP work or materials to any other students, prospective students, or individuals. Students who are found to have participated in or assisted



Practice Readiness Education Program

another student's plagiarism in any way, directly or indirectly, may be subject to disciplinary action by CPLED or their law society.

c. Instructions and Protocols

In completing their work, students are expected to comply with all instructions and protocols provided by CPLED.

4. Late or Incomplete Submissions

Unless a student obtains prior approval in writing from CPLED, or unless CPLED grants a deferral, submissions for assignments and evaluations are not accepted after the deadline date. The ability to submit online ends promptly at 11:59 p.m. MDT/MST on the specified deadline. Deadlines are strictly enforced.

If a student submits more than one document to the Dropbox, the last document submitted at the time of the deadline is the one that is assessed or evaluated.

Incomplete submissions may be provided feedback or evaluated to the extent reasonably possible. Late assignments are not marked or provided feedback.

Except when a belated deferral is granted, there is no exception to this policy with respect to an assignment or evaluation. The Operations Manager may review the matter, including any special or unusual circumstances, with a view to preserving the integrity of the credentialing process (including maintaining a level playing field for all students).

5. Collaboration

Although collaboration is acceptable and encouraged during the Foundation Workshops, during the Virtual Firm and in the Capstone Assessment, collaboration, of any kind, is **strictly prohibited** on assignments and evaluations.

CPLED uses Turnitin as a plagiarism detection service within D2L.

6. Information and Privacy

CPLED collects, uses, and discloses information, including personal information, for the purposes of delivering the PREP.

a. General Collection, Use, and Disclosure of Personal Information

CPLED collects, uses, and discloses personal information for various purposes, including:

- to assist in the operation of the PREP, including processing applications, administering the program and participation in it, and monitoring performance,
- to prevent, detect, sanction, or report any breach of the requirements of professional behavior, professional integrity, and academic integrity, and
- to provide evidence relevant to a breach of the requirements of professional behavior, professional integrity, and academic integrity.

This includes disclosing the names of students and the names of the organization(s) where they are completing their articles to facilitators and evaluators for the purposes of assisting in the operation of the PREP and determining whether there are any conflicts involved in a particular individual assessing a student's assignments and evaluations.

This also includes collecting, using, and disclosing submitted assignments and evaluations for the purposes of evaluating and improving the PREP. Any materials with personal identifying information are only disclosed for this purpose to individuals and organizations who are obligated to keep the information.

b. Student Contact Information

Student contact information is used to communicate with students about the PREP. Students must maintain a current and alternate address, phone number, and email address on file with CPLED. All changes to contact information (including name changes) must be sent to CPLED Administration Support at admin@CPLED.ca.

Students should also advise their respective Law Society of any changes in student contact information. Updating information with CPLED does not result in an update of information with the student's Law Society (and vice versa).

c. Student Communication Through D2L

All students are given a D2L email account. PREP admin, Facilitators, Practice Managers, etc. will be communicating with students via D2L throughout the Program.

Look at the top of the page in the D2L browser window. If you see an orange dot on the email (envelope) icon, or on the announcement (bell) icon, click on the icon to see your message(s)



Students may turn on notifications in D2L to forward announcements and alerts to their direct personal or work email inbox so that nothing is missed.

d. Recording

CPLED may record live performance within the Orientation, Foundation Workshops and Capstone Assessment of PREP. Students give permission for their image and voice, captured during these sessions, to be collected, used, and disclosed for the purposes of PREP.

These purposes include evaluating student performance, training evaluators, and monitoring and assessing evaluator performance.

Students with an approved accommodation may also be permitted to capture in-person instruction using an audio recording device. Such recordings may include voices of other



Practice Readiness Education Program

participating students. The accommodated student commits to destroying these recordings once the purpose for which the recording was made has been served.

e. Exchange of Information with Law Societies

Information, including personal information about students, may be exchanged between the student's Law Society and CPLED where the exchange of that information is made for the purpose of monitoring student performance, assisting in the operation of the PREP or governing the articling process.

The Operations Manager also discloses personal student information to the student's Law Society:

- to prevent, detect, sanction or report any breach of the requirements of professional behavior, professional integrity, and academic integrity,
- to advise the Law Society of any actions taken by a student that are unprofessional, without academic integrity, or without professional integrity, and
- to provide evidence relevant to a breach of the requirements of professional behavior, professional integrity, and academic integrity.

f. Exchange of Information with Principals

Both the student's Law Society and the articling student's principal are advised of students' grades and CPLED may reach out to the principal regarding student progress (Appendix A: Practice Readiness Education Program (PREP) Student Agreement). Other personal information concerning a student is not shared with that student's principal unless otherwise permitted by the student in question or by the student's Law Society.

Except as prohibited by the *CPLED Professional Integrity Policy*, students are strongly encouraged to share information directly with their principals.

g. Other Collection, Use, and Disclosure

Information about any other collection, use, and disclosure of personal information by CPLED is set out in CPLED's *Privacy Policy*, as posted at CPLED's website (<https://cpled.ca/privacy-terms/>) and as amended from time to time.

7. Accessibility and Special Circumstances

a. Accessibility

CPLED strives to ensure the PREP is easily accessible but is sensitive to the fact that the program may present unintended challenges for some students. In some cases, students may have individual needs that necessitate an accommodation, an excused absence, a deferral, scheduling change, or a withdrawal from the PREP. More information about these options can be found below.



Practice Readiness Education Program

Note:

CPLED encourages students to identify individual circumstances of which they would like CPLED to be aware. This information helps CPLED identify students for whom the PREP might present unintended challenges. Such circumstances include (but are not limited to) physical disability, mental disability, family status and financial hardship.

Providing this information is voluntary. Such information (as with all personal information) is kept in the strictest confidence.

b. Accommodation

Accommodation refers to the process of making alterations to the delivery of the PREP so that it becomes accessible to more people, including persons with disabilities.

There is no specific time limit for making a request for accommodation. To give effect to a request, however, the request must be received within a reasonable period of time, bearing in mind the nature of the accommodation sought. Whenever possible, students are encouraged to raise potential accessibility issues during the registration process.

Accommodation requests must be supported by evidence that the student has a ground for accommodation. The documentation requirement is not intended to create additional challenges for the student, but to ensure that accommodations are only granted when appropriate (to preserve fairness for all students). In many cases, evidence takes the form of medical documentation (e.g. a note or report from a physician, psychiatrist, psychologist, counsellor, or other professional). In some cases, other evidence suffices (e.g. a CNIB card as evidence of visual impairment).

CPLED reviews the evidence to determine whether an accommodation can be granted; CPLED does not assess the disability, but only the sufficiency of the evidence provided in support of the request.

Students requesting accommodation are not requesting to be relieved of their responsibility to develop the essential competencies expected of all students. To protect both students and the integrity of the program, all students (regardless of accommodation) must still meet all PREP requirements and participate in all essential program components.

CPLED will work directly with each student to develop an individualized plan, considering a range of environmental, instructional, and assessment conditions. Both the student and CPLED are responsible for working towards a successful accommodation strategy.

Once an accommodation strategy is identified, CPLED follows up with the student (typically by letter sent via email, unless another method of communication is requested) with the proposed accommodation plan. The student is asked to confirm whether the proposal addresses the relevant concerns and to identify if anything has been missed. Once the plan is complete, relevant portions are then communicated, on a need to know basis, to those involved in delivering PREP.



Practice Readiness Education Program

c. Absences

Attendance at face-to-face PREP sessions (Orientation, Foundation Workshops, Capstone Assessment) is mandatory for all students. Successful completion of the PREP requires attendance and participation. Students are expected to be available for the entirety of a face-to-face session.

Sometimes, however, circumstances arise that are beyond a student's control. Such circumstances might include an illness or medical condition, religious conviction, domestic affliction or bereavement, or other special or unusual circumstance. If such circumstances result in a conflict with a face-to-face session, students are encouraged to apply for an excused absence.

An application to be excused from the requirement of attendance and participation is to be made and addressed to the Operations Manager. Absences may only be excused with the approval of the Operations Manager and may be approved with or without conditions. The Operations Manager's decision is final.

Where no application is received, or where the request is denied, the Operations Manager may indicate by notation on the Statement of Grades that a student did not attend and participate.

To obtain approval to be absent from any part of the PREP, students should complete an *Application for an Excused Absence* form (see Appendix E: Application Forms) and submit to CPLED Administration at admin@CPLED.ca.

If a student would miss a substantial portion of a face-to-face session, the student must instead complete an *Application for a Deferral* form (see Appendix D).

Note: Involvement in other work, regardless of its nature, does not constitute adequate reason for non-attendance, failure to participate, or failure to satisfactorily complete PREP requirements.

Students should not schedule work meetings, court appearances, or other firm-related activities during this time. Students are not granted an excused absence for these types of

d. Deferral

Students must comply with all deadlines and timelines. Sometimes, however, circumstances arise that are beyond a student's control. Such circumstances might include an illness or medical condition, religious conviction, domestic affliction or bereavement, or other special or unusual circumstance.

If a student cannot complete a PREP requirement due to such circumstances, they may apply to the Operations Manager for a deferral.



Practice Readiness Education Program

Students should complete an *Application for a Deferral* form (see Appendix E: Application Forms) and submit it to CPLED Administration at admin@CPLED.ca. Within seven days of the student's application, the application must be supported by evidence satisfactory to the Operations Manager that the student is suffering from illness or other circumstances that materially contributed to his or her inability to complete the PREP.

CPLED notifies a student of the Operation Manager's decision by email within 10 business days of receipt of all supporting documentation.

e. Withdrawals

A student who withdraws from the PREP is eligible for a *pro-rata* refund of tuition. The tuition refund is calculated based on the number of phases (out of 4) to which the student has not yet been provided access.

If a student commences the PREP (i.e. receives access to any module's materials) and thereafter chooses to withdraw from the PREP, the student has attempted the PREP. If a student re-applies to the PREP in a subsequent year, the student will commence PREP where the student left off, unless the student's Law Society directs otherwise.

If a student is considering withdrawing due to an illness or medical condition, religious conviction, domestic affliction, bereavement, or other special or unusual circumstance, that student may have grounds for a deferral. Contact CPLED for details. See Appendix E: Application Forms for a copy of the *Application to Withdraw* form.

A student who has not successfully completed the PREP after attempting to do so a second time (a) is deemed to have not achieved entry-level competence; (b) may not repeat the PREP, and (c) will have their registration as an articling student terminated.

Student Concerns

If a student has a concern or complaint, they are encouraged to contact CPLED Administration at admin@CPLED.ca. If the concern or complaint is not resolved to the student's satisfaction, the matter can be escalated to the Operations Manager.

Student Assistance

Balancing the demands of articling and the PREP can be challenging for students. Part of making a successful transition from law school to practice is learning how to manage stress in a healthy manner and knowing when to get outside help. Students who are feeling stressed or overwhelmed are encouraged to contact:

- **Alberta Lawyers' Assistance Society (Assist)**

For immediate help, call **1.877.498.6898 (toll free) 24 hours a day, 7 days a week**. For more information on Assist's services and to access online resources, visit <http://albertalawyersassist.ca/>.

- **Saskatchewan Lawyers Concerned for Lawyers (LCL)**

For immediate help, call **1.800.663.1142 (toll free) 24 hours a day, 7 days a week**. For more information on LCL's services and to access online resources, visit <https://lawyersconcernedforlawyers.ca/>.

- **Manitoba Health and Wellness Program**

For immediate help, call **1.800.590.5553 (toll free) 24 hours a day, 7 days a week**. **Deaf Access Line at 204.775.0586**. For more information on services and to access online resources, visit <http://www.lawsociety.mb.ca/member-resources/lawyers-health-wellness-program>.

Students are also encouraged to read The Effective Lawyer module in the PREP Foundation Modules. This module provides guidance and tools to support students to meet the demands of their professional and personal life.

Student Support: Contact Information

Technical Questions

Support is available to assist students with technical issues at prep.support@cpled.ca. Students can expect a response Monday to Friday within 24 hours.

Course Content Questions

D2L contains a discussion board, where students can communicate with other students and their facilitators and practice managers to further their understanding of the PREP materials. Please allow your facilitator up to 24 hours to respond to course inquiries.

Questions about the content of any of the Foundation Modules will be answered by Subject Matter Experts via the Discussion Board in D2L. Expect a 24-hour response, 7 days a week.



Practice Readiness Education Program

CPLED and PREP General Inquiries

For questions about CPLED or general PREP inquiries, please contact Administrative Support at admin@CPLED.ca.

For up-to-date information about the PREP visit <https://cpled.ca> or contact CPLED at:

CPLED

500, 919 – 11th. Avenue S.W.

Calgary, Alberta T2R 1P3

Phone: 587.393.2189



Practice Readiness Education Program

Appendix A: Practice Readiness Education Program (PREP) Student Agreement

In consideration of the Canadian Centre for Professional Legal Education (“CPLED”) accepting my registration in the Practice Readiness Education Program (PREP), I _____ agree to the following:

1. I will abide by and comply with:
 - a. CPLED’s Professional Integrity Policy (attached hereto);
 - b. PREP protocols (e.g. submission protocols and evaluation protocols);
 - c. CPLED’s policies and procedures;
 - d. The Rules of the Law Society of which I am an articling student; and
 - e. My Law Society’s Code of Conduct each as amended from time to time.
2. I understand and acknowledge that the PREP materials provided to me are proprietary and confidential. PREP content and materials are for my use only.
3. I am solely responsible to produce any work required as a result of participating in PREP. All work I submit to PREP will be my own original work.
4. I am responsible for storing my work in a secure manner.
5. Breaches of professional integrity, including plagiarism, are not tolerated by CPLED and may result in investigation, suspension, failure in the program and disciplinary action by CPLED, and referral to the Law Society of which I have articling student status for investigation and disciplinary action.
6. I will not lend, give, or sell my PREP work or materials to any other students, prospective students, or individuals. If I am found to have participated in or assisted in another student’s plagiarism in any way, directly or indirectly, I may be subject to disciplinary action by CPLED, my Law Society or both.

Personal Information

1. I consent to the following collection, use, and disclosure of my personal information and acknowledge that my participation in PREP is conditional upon my consent:
 - a. CPLED may collect and use my personal information for the following purposes:
 - i. To assist in the operation of PREP, including administering PREP and my participation in it, and monitoring my performance in PREP;
 - ii. To prevent, detect, sanction or report any breach of the requirements of professional behavior, professional integrity, and academic integrity; and



Practice Readiness Education Program

- iii. To provide evidence relevant to a breach of the requirements of professional behavior, professional integrity, and academic integrity.
 - b. CPLED may disclose my personal information to my Law Society for the following purposes, in accordance with the Rules of my Law Society:
 - i. To prevent, detect, sanction or report any breach of the requirements of professional behavior, professional integrity and academic integrity;
 - ii. To advise the Law Society of any actions taken by a student that are unprofessional, without academic integrity, or without professional integrity;
 - iii. To provide evidence relevant to a breach of the requirements of professional behavior, professional integrity, and academic integrity;
 - iv. To monitor student performance; and
 - v. To govern the articling process.
 - c. CPLED may disclose my PREP grades to my principal. CPLED may also communicate to my principal regarding any matter directly pertaining to my participation in PREP.
 - d. CPLED may disclose to my facilitators, assessors, and practice managers my personal information, including my name and the name of the organization(s) where I am completing my articles, for the purposes of assisting in the operation of the PREP and determining whether there are any conflicts involved in a particular individual assessing my assignments.
 - e. CPLED may collect, use, and disclose my personal information, such as my submitted assignments, for the purposes of evaluating and improving PREP. I understand that any materials with personally identifying information will only be disclosed for this purpose to individuals and organizations who are obligated to keep the information confidential pursuant to an agreement with CPLED.
 - f. CPLED may collect and use my contact information to send me information regarding educational resources for articling students.
2. I give permission for my image and voice, captured during the in-person portions of the PREP through video, photo and digital cameras, and audio recording devices, to be collected, used, and disclosed solely for the purposes of the PREP, including evaluating student performance, giving effect to approved accommodations, training facilitators and evaluators, and monitoring and assessing facilitator and evaluator performance, and I waive any rights of compensation or ownership thereto.

(Student Signature)

(Date)



Practice Readiness Education Program

Appendix B: Professional Integrity Policy

1. PREP students must conduct themselves with the honesty and professional integrity expected of a lawyer. To ensure licensing requirements are met and to protect the integrity of PREP, students are bound by the additional provisions in this policy.
2. The onus is on the student to seek clarification from CPLED concerning any activity that could violate this policy.
3. As much as possible, students should engage in PREP activities in the same way they engage in the practice of law. Students may discuss and analyze the general law, background materials, precedents and learning exercises.
4. CPLED's primary role is to evaluate students to ensure that they meet licensing requirements for admission to the profession. When students are engaged in PREP evaluation activities, they must ensure that the work they submit, or present represents their own knowledge, skills and abilities. This Professional Integrity Policy restricts students' ability to share information when they are completing assignments and evaluations.
5. All assignment submissions and evaluations must be the student's own original work.
6. To prepare their assignments, students may use precedents from: a) PREP material and b) the provided LexisNexis account provided to students.
7. Adapting, paraphrasing or incorporating precedents as permitted in paragraph 6 is not plagiarism, but students must provide the source of any precedent that they use, adapt, paraphrase or incorporate. Students may be asked to produce any precedent they copy, paraphrase or incorporate.
8. Students who quote from, paraphrase, or incorporate any part of primary or secondary research materials, including PREP resource materials, into their assignment submissions must provide proper citation.
9. A student who inadvertently breaches this policy must immediately advise CPLED.
10. A student who breaches this policy may be subject to a failed grade on the assignment or evaluation, suspension, or other consequences.



Practice Readiness Education Program

Appendix C: PREP Schedule

The Alberta PREP Pilot year runs from August 1, 2019 – April 30, 2020

Orientation Session

August 1, 2019, at the University of Calgary’s downtown campus (906 8 Ave SW, Calgary, AB) from 8:30 a.m. to 4:30 p.m. in room 416.

Foundation Modules

August 1 – October 30, 2019

Students must complete their first attempt at the module quiz by 11:59 pm of the deadline date.

	Module + Quiz <i>(assume 1 quiz attempt @ 30 minutes)</i>	Time (Hrs)	Duration	Time (Days) 1.25 hrs/day	Deadline (11:59 pm)
1	Professional Ethics	13	August 2-12	10	19-Aug
2	Indigenous Law, Cultures and People	9.5	August 13-20	8	27-Aug
3	Client Relationship Management	6	August 21-25	5	1-Sep
4	Interviewing	5	August 26-29	4	5-Sep
5	Negotiating	4	August 30-Sept 1	3	8-Sep
6	Advocacy	4.5	Sept 2-7	4	14-Sep
7	Legal Research, Fact Gathering and Case Management	13	Sept 8-18	10	26-Sep
8	Legal Writing	4.5	Sept 19-22	4	29-Sep
9	Legal Drafting	4	Sept 23-25	3	2-Oct
	<i>Multi Media: Legal Skills in Action</i>	5	Sept 26-29	4	6-Oct
10	Technology Skills and Tools	11	Sept 30-Oct 8	9	15-Oct
11	Practice Management and Trust Accounting	11	Oct 9-17	9	24-Oct
	<i>Multi Media: Practice Management in Action</i>	3.5	Oct 18-20	3	27-Oct
12	The Effective Lawyer	12	Oct 21-Oct 30	10	6-Nov
	Totals	106		84	

Foundation Workshops

The Calgary Foundation Workshops will take place **Monday, November 25 to Friday, November 29, 2019** (5 full days). Students will be provided with pre-work prior to the workshop and they will be given homework at the end of each full day. Homework will take approximately 1 to 2 hours to complete at the end of each session day.

Location to be announced (TBA).

Virtual Firm

Online simulations begins January 6 and ends March 31, 2020. Simulations will run during the first two weeks of the month. Each simulation will take approximately 25 hours to complete.



Practice Readiness Education Program

Capstone Assessments

The Calgary Capstone Assessment will take place **Monday, April 20 to Friday, April 24, 2020** (5 full days). Location TBA.

Procertas LTA

Students are encouraged to complete their Procertas LTA requirements during the **month of December 2019**.

Appendix D: Sample Assessment Criteria

Interviewing Assessment Criteria

The Interviewing Assessment Criteria is designed for use by simulated clients who will be interviewed by, as well as assess the performance of, student lawyers. For that reason, it differs slightly in presentation from Assessment Criteria for other competencies. It also uses a numbered competency scale which corresponds with the Assessment Criteria in PREP, which uses a description-based competency scale. The two scales concord as follows:

1	No competence demonstrated	NA
2	Nominal competence demonstrated	NC
3	Reaching entry-level competence	RC
4	Entry-level competence	EC
5	Competent practicing lawyer	CL

The four areas that are assessed are outlined in the following pages:

1. The greeting and introduction by the student lawyer was appropriate
2. I felt the student lawyer listened to me.
3. The student lawyer approach to questioning was helpful
4. The student lawyer accurately summarised my situation

1. The greeting and introduction by the student lawyer was appropriate

This item is designed to assess the degree to which the lawyer can set you at ease in the first few minutes of the interview. There should be an appropriate attempt to make conversation with you, set you at ease, and then a smooth movement to the matter in hand.

1 (N/A)	2 (NC)	3 (RC)	4 (EC)	5 (CL)
No attempt to meet & greet you; plunges straight into matter. Inappropriate remarks made.	Brusque introduction, then straight to matter. Does not seem really interested in you. Little or limited recognition of client situation.	Friendly greeting and recognition of client situation.	Included appropriate small talk in greeting; greeting was appropriate in tone and manner to the client's situation. Good transition to client's narrative.	Fluent and confident greeting; very effective use of small talk in context; made you feel at home from the start. Very smooth transition to client narrative. Instant rapport established.

2. I felt the student lawyer listened to me.

This item is designed to assess the degree to which the lawyer can listen carefully to you. These criteria focus especially on the early part of the meeting when the client should be encouraged to tell their story and concerns in their own words. This entails *active* listening – where it is necessary for the interview structure or the lawyer’s understanding of your narrative. The lawyer will not interrupt, cut you off, talk over you or rush you in conversation. The lawyer reacts to your responses appropriately. The lawyer may take notes where appropriate, but if the lawyer does so, the lawyer should not lose much eye contact with you. To some extent in this item we are concerned with what the lawyer does *not* do that facilitates the interview.

1 (N/A)	2 (NC)	3 (RC)	4 (EC)	5 (CL)
<p>Lawyer prevents you from talking by interrupting, cutting off, talking over, rushing you.</p> <p>Takes over the conversation prematurely as if the lawyer already knows all the answers.</p>	<p>Lawyer limits your opportunity to talk by interrupting, cutting you off, etc.</p> <p>You are allowed to answer specific questions but are not allowed to expand on topics.</p>	<p>Lawyer rarely interrupts or cuts off or rushes you.</p> <p>The lawyer reacts to your responses appropriately in order to allow you to tell your story. More interested in notes taken than in eye contact with you.</p>	<p>The lawyer is clearly listening closely to you.</p> <p>If the lawyer interrupts, it is only to assist you in telling the story more effectively.</p> <p>Lawyer provides opportunities for you to lead the discussion where appropriate.</p> <p>Good eye contact and non-verbal cues.</p>	<p>The lawyer is an excellent listener and speaks only when it is clearly helpful to your telling your story. Lawyer uses silence and other non-verbal facilitators to give you an opportunity to expand.</p> <p>Excellent eye contact and non-verbal cues.</p>

3. The student lawyer approach to questioning was helpful

This item is designed to assess the degree to which the lawyer can use both open and closed questions to elicit information from you. Effective questions often incorporate what the client has previously said and “frame” the question with a brief explanation of why the question is being asked. The use of such questions should vary according to topic, stage in the interview and many other interpersonal factors, and the lawyer should show awareness of when it is appropriate to use one approach rather than another. This is also designed to assess the degree to which the lawyer can identify which facts are germane to the legal scenario and your interests, and which you do not have. You may, of course, have these facts, but in the course of the interview the facts do not become apparent, either because you have forgotten to mention them, or because the lawyer did not pursue the matter sufficiently during the interview.

1 (N/A)	2 (NC)	3 (RC)	4 (EC)	5 (CL)
<p>Lawyer ignores your cues or misses obvious facts that require questioning; lawyer uses closed questions where open would be better, or <i>vice versa</i>.</p> <p>No attempt by lawyer to identify relevant facts required; no attempt to pursue in questions; no statement to you about the need for further information</p>	<p>Lawyer uses questions rather aimlessly; does not seem to know what he or she is looking for. Does not preview sets of closed questions. Overuses closed questions.</p> <p>Some attempt by lawyer to identify relevant facts; no attempt to pursue in questions; no statement to you about the need for further information</p>	<p>Lawyer can question systematically.</p> <p>Effective follow-up questions enable the lawyer to identify the basic relevant facts in your narrative.</p>	<p>Lawyer identifies most of the relevant facts; pursues further facts required, in questions; informs you about the need for further specific information.</p> <p>Lawyer can appreciate when to use open & closed questions; can question systematically and extensively; can pursue facts and legally relevant information.</p> <p>Good use of follow-up questions for clarification in logical sequence.</p>	<p>Excellent use of a wide variety of questions. Questions fluently embedded in the interview. Confident use of questioning to create a sense of a narrative building within the interview; gives you confidence in his/her ability to obtain and use information.</p> <p>All relevant facts required are identified by the lawyer; thorough questioning to determine extent of information required.</p>

4. The student lawyer accurately summarized my situation

This item is designed to assess the degree to which the lawyer communicates with the client to confirm his or her understanding of the client’s narrative. This can be demonstrated by mini summaries in which the lawyer feeds back an understanding of parts of the client’s narrative to the client. It can also take the shape of a larger summary towards the end of the interview. It should include acknowledgment of the concerns raised by the client.

1 (N/A)	2 (NC)	3 (RC)	4 (EC)	5 (CL)
<p>No confirmation of client narrative and issues. Lawyer insensitive to or dismissive of client concerns</p>	<p>Attempted summary of client narrative, but awkwardly presented (facts only) and incomplete. No or very little communication over client concerns.</p>	<p>Summary of client narrative captures most important elements of client's story and clearly identifies main concern(s).</p>	<p>Very good summary.</p> <p>Lawyer checks accuracy and completeness with client and supplements summary if need be. Lawyer shows clear sensitivity regarding client's concerns.</p>	<p>Excellent summary of client narrative. Links to future action.</p> <p>Lawyer takes account of client's emotions, concerns, wishes, etc in the narrative, and shows the client he or she is taking account of this in the summary.</p>



Practice Readiness Education Program

Appendix E: Application Forms



Practice Readiness Education Program

APPLICATION FOR AN EXCUSED ABSENCE

This application form is used to request to be excused from attendance and/or participation at one or more face-to-face components of the PREP. Please read and follow the attached instructions to avoid delay or rejection of your application.

Student Information	
Last Name	First Name
Email	Phone
Request	
I request to be excused from the following portion(s) of the face-to-face modules held on the date(s) listed below:	
Reason for Absence	Supporting Documentation
I request to be excused for the following reasons: <input type="checkbox"/> Illness/Medical Condition <input type="checkbox"/> Religious Conviction <input type="checkbox"/> Domestic Affliction/Bereavement <input type="checkbox"/> Other circumstance, namely:	I am providing the following documentation in support: <input type="checkbox"/> Medical documentation <input type="checkbox"/> Letter from my religious organization <input type="checkbox"/> Death certificate, accident report, or similar evidence <input type="checkbox"/> Other (specified below) <input type="checkbox"/> None The above documentation is: <input type="checkbox"/> Attached <input type="checkbox"/> To follow
Additional Information (attach a separate sheet if required):	

I confirm that I have read and understood the instructions and requirements of this form and that all the information and documentation provided in support of this application are accurate and true. Further, I authorize CPLED and my Law Society to contact those who have provided documentation submitted in support of this application, including but not limited to medical documentation, for purposes of verifying authenticity.

Student Signature	Date [YYYY-MM-DD]
Decision (Office Use Only)	
<input type="checkbox"/> Approved without conditions <input type="checkbox"/> Approved with conditions <input type="checkbox"/> Denied	Reasons for Decision
Conditions, if any:	<input type="checkbox"/> Substantial portion of the face-to-face content – student must complete <i>Application for a Deferral</i> <input type="checkbox"/> Request relates to travel plans or work-related conflicts <input type="checkbox"/> Other
Other Comments (attach a separate sheet if required):	
OPERATIONS MANAGER Signature	Date

INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR AN EXCUSED ABSENCE

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

1. **Mandatory Attendance.** Attendance at face-to-face PREP sessions is mandatory for all students. Successful completion of PREP requires attendance and participation (Rule 60(2)(a)). Students are expected to be available for the entirety of a face-to-face session.
2. **Application for an Excused Absence.** An application to be excused from the requirement of attendance and participation shall be governed by Rule 62. Students requesting to be excused from the requirement of attendance and participation may apply to the Operations Manager. Absences may only be excused with the approval of the Operations Manager, with or without conditions.
3. **Missing a Substantial Portion.** If the student will miss a substantial portion of a face-to-face session, the student must instead complete an *Application for a Deferral* form.
4. **Documentation.** If the student has supporting documentation to include, that documentation must be provided within seven days of the student's application.
5. **Belated Requests for an Excused Absence.** A belated request for an excused absence is made where a student unexpectedly misses a material portion of a face-to-face component of the PREP (i.e. late arrival).
6. **Decision.** The Operations Manager may grant an excused absence, with or without conditions. Where no application is received, or where the request is denied, the Operations Manager may indicate by notation on the Statement of Grades that a student did not attend and participate as required by Rule 60(2)(a). CPLED will notify a student of the Operations Manager decision by email within 10 business days of receipt of all supporting documentation.

Instructions for Completing an Application for an Excused Absence

Complete the application in full.

- (a) **Student Information.** Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, CPLED uses the current contact information on file. If your contact information has changed, please contact CPLED as soon as possible.
- (b) **Request.** Identify the specific dates and times of the requested absence. If the contemplated absence will result in the student missing a substantial portion of a face-to-face session the request will be denied and the student will be advised to complete an *Application for a Deferral* form.
- (c) **Reason for Absence.** Please identify the reason for your request to be excused from attendance. Travel plans and work-related conflicts are not valid reasons for a request.
- (d) **Signature.** Please sign the application either digitally or in writing to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true. By signing this form, you are also authorizing CPLED and the Law Society of Alberta to contact those who have provided documentation submitted in support of the application, including but not limited to medical documentation, for purposes of verifying authenticity.

Submit the application form and supporting documentation to CPLED, Suite 500, 919 11th Ave SW, Calgary AB T2R 1P3 or by email to admin@CPLED.ca.



Practice Readiness Education Program

APPLICATION FOR A DEFERRAL

This application form is used to request to defer one or more PREP requirements. Please read and follow the attached instructions to avoid delay or rejection of your application.

Student Information	
Last Name	First Name
Email	Phone
Request	
I request to defer the following: <ul style="list-style-type: none"> <input type="checkbox"/> Foundation Modules <input type="checkbox"/> Foundation Workshops <input type="checkbox"/> Virtual Firm <input type="checkbox"/> Capstone Assessment 	
Reason for Deferral	Supporting Documentation
I request to defer for the following reasons: <ul style="list-style-type: none"> <input type="checkbox"/> Illness/Medical Condition <input type="checkbox"/> Religious Conviction <input type="checkbox"/> Domestic Affliction/Bereavement <input type="checkbox"/> Other Special or Unusual Circumstance, namely: 	I am providing the following documentation in support: <ul style="list-style-type: none"> <input type="checkbox"/> Medical documentation <input type="checkbox"/> Letter from my religious organization <input type="checkbox"/> Death certificate, accident report, or similar evidence <input type="checkbox"/> Other (specified below) The above documentation is: <ul style="list-style-type: none"> <input type="checkbox"/> Attached <input type="checkbox"/> To follow
Additional Information (attach a separate sheet if required):	
I confirm that I have read and understood the instructions and requirements of this form and that all the information and documentation provided in support of this application are accurate and true. Further, I authorize CPLED and my Law Society to contact those who have provided documentation submitted in support of this application, including but not limited to medical documentation, for purposes of verifying authenticity.	
Student Signature	Date [YYYY-MM-DD]
Decision (Office Use Only)	
<input type="checkbox"/> Approved without conditions <input type="checkbox"/> Approved with conditions	<input type="checkbox"/> Denied
Conditions, if any:	Reasons for Decision <ul style="list-style-type: none"> <input type="checkbox"/> Reasons do not indicate serious illness or extraordinary circumstances beyond student's control <input type="checkbox"/> Insufficient documentation <input type="checkbox"/> Other
Other Comments (attach a separate sheet if required):	
OPERATIONS MANAGER Signature	Date



Practice Readiness Education Program

INSTRUCTIONS FOR COMPLETING AN APPLICATION FOR A DEFERRAL

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

1. Application for a Deferral. Students who are unable to complete a PREP assignment or evaluation or attend a face-to-face session may apply to the Operations Manager of CPLED Alberta for a deferral on or before the scheduled date of the requirement.
2. Documentation. Within seven days of the student's application, the application must be supported by evidence satisfactory to the Operations Manager that the student is suffering from illness or other circumstances that materially contributed to his or her inability to complete the requirement.
3. Belated Requests for a Deferral. A belated request for a deferral is accepted in the limited circumstances in which the student is able to show objectively that their judgment (at the time of the requirement) was impaired to such an extent that they were unable to know that a deferral should have been requested. Generally, this determination is only made on the basis of medical, psychiatric or psychological evidence.
4. Decision. The Operations Manager may grant a deferral to a time and place determined by the Operations Manager and within a reasonable time of the original requirement. Where no application is received or the Operations Manager is not satisfied that the application is adequately supported by evidence, the Operations Manager may rule that the student has failed the requirement. CPLED will notify you of the Operations Manager's decision by email within 10 business days of receipt of all supporting documentation.

Instructions for Completing an Application for a Deferral

1. Complete the application in full.
 - (a) Student Information. Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, CPLED uses the current contact information on file. If your contact information has changed, contact CPLED as soon as possible.
 - (b) Request. Identify the specific PREP phase(s) you are requesting to defer.
 - (c) Reason for Deferral. Identify the reason for your request to defer. Deferrals may be granted in cases of serious illness or extraordinary circumstances beyond the student's control. Travel plans and work-related conflicts are not valid reasons for a request.
 - (d) Supporting Documentation. Requests are not approved without written evidence of the need for a deferral. Supporting documentation is required in all circumstances. Submission of documentation does not in itself constitute grounds for approval. The reasons in support of the request must clearly demonstrate serious illness or extraordinary circumstances beyond the student's control that would warrant deferral. Note the following:
 - (i) If you are requesting to defer due to a serious illness or medical condition, then you must be seen by a physician while you are ill. Medical documentation must be on official letterhead of the service provider and include (a) date of onset of illness and date seen by the physician, (b) anticipated date of recovery, and (c) degree of incapacitation.
 - (ii) If you are requesting to defer due to a religious conviction, then you must provide a letter from your religious organization. Religious documentation must be on official letterhead of the religious organization.
 - (iii) If you are requesting to defer due to a domestic affliction/bereavement

- (e.g. a death in the family or serious accident), then you must provide a copy of the death certificate, accident report, or other similar documentation.
- (iv) If you are requesting to defer due to a special or unusual circumstance such that the requirement to attend and participate would be unfair or unreasonable, then please consult CPLED regarding appropriate documentation.
 - (e) **Signature.** Sign the application either digitally or in writing to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true. By signing this form, you are also authorizing CPLED and the Law Society of Alberta to contact those who have provided documentation submitted in support of the application, including but not limited to medical documentation, for purposes of verifying authenticity.
2. Submit the application form and supporting documentation to CPLED, Suite 500, 919 11th Ave SW, Calgary AB T2R 1P3 or by email to admin@CPLED.ca.

INSTRUCTIONS FOR COMPLETING AN APPLICATION TO WITHDRAW

Please read and follow these instructions to avoid delay or rejection of your application.

General Information

1. **Application to Withdraw.** A student who wishes to withdraw from the CPLED Program may apply to the Operations Manager of CPLED Alberta. For a student who has not yet commenced PREP, an *Application to Withdraw* is not required; the student may simply request to cancel their registration.
2. **Tuition Refund.** A student who withdraws from the PREP is eligible for a *pro-rata* refund of tuition. The tuition refund is calculated based on the PREP phases to which the student has not yet been provided access.
3. **Effect of Withdrawing.** If a student commences the PREP (i.e. receives access to any module's materials) and thereafter chooses to withdraw from the PREP, the student has attempted the PREP. If a student re-applies to the PREP in a subsequent year, the student will begin PREP where the student left off, unless the student's Law Society directs otherwise.
4. **Decision.** CPLED will notify you of the Operations Manager's decision by email within 10 business days of receipt of a completed *Application to Withdraw*.

Instructions for Completing an Application to Withdraw

1. Complete the application in full.
 - (a) **Student Information.** Complete the Student Information section, including an email and phone number at which to contact you if further particulars are required. For official correspondence, CPLED uses the current contact information on file. If your contact information has changed, contact CPLED.
 - (b) **Request.** Identify the effective date of your requested withdrawal from the program. The effective date of the withdrawal determines tuition refund eligibility.
 - (c) **Reason for Withdrawal.** Identify the reason for your request to withdraw. If you are withdrawing for reasons that would constitute grounds for a deferral (i.e. serious illness or extraordinary circumstances beyond your control), contact CPLED for information about an *Application for a Deferral*.
 - (d) **Signature.** Sign the application either digitally or in writing to confirm that you have read and understood the instructions and requirements of the form and that all the information and documentation provided in support of the application is accurate and true.
2. Submit the application form and supporting documentation to CPLED, Suite 500, 919 11th Ave SW, Calgary AB T2R 1P3 or by email to admin@CPLED.ca.