



1907-2007



New Initiatives Intended to Ensure Competence and Professionalism

By Jim Peacock, QC, President 2007-2008



Jim Peacock, QC

To commemorate the 100th year of the Law Society of Alberta, the Benchers were very privileged to launch in 2007 its Pro Bono Law Alberta legacy project.

The speed with which this initiative has been embraced and supported by key stakeholders and the work that had already been done led me to believe that we would leave Alberta with a meaningful legacy. I have not been disappointed. Pro Bono Law Alberta began in spring 2007, laying a foundation for addressing some of the access to justice difficulties facing needy Albertans.

The anniversary celebrations served to highlight in the minds of the public the important role that lawyers have played and continue to play in the growth and development of Alberta. The centennial provided the Law Society of Alberta with a significant opportunity to turn the public and legal spotlight onto itself, to commemorate its honourable standing today, and to share its vision for the future with Albertans.

The year 2007 was not only about these celebrations as the Law Society achieved important goals in becoming a model regulator. The public has high expectations of lawyers, and as a regulator, we have to ensure that: we have a sound understanding of what expectations are reasonable; we are taking appropriate steps to assess whether those expectations are being met; and we are effectively keeping both lawyers and the public well informed about what we are doing.

In 2007, the Law Society of Alberta approved new initiatives that are intended to ensure competence and professionalism. These include:

- Moving forward on a continuing professional development initiative that is intended to ensure that the assurance we give the public of lawyers' competence and professionalism is matched by reality.
- Approving rule changes to improve and streamline the CPLED education and admission process,

effective for the 2007 July session.

- Reviewing extensively the LSA's Assurance Fund to identify the underlying guiding and operating principles of the fund, and improving the claims process. The new Assurance Fund rules enable timely and efficient processing of the legitimate claims of clients whose money was misappropriated by a lawyer.

In addition to these, the Benchers have worked extremely hard on behalf of the lawyers in Alberta to explore, discuss, debate and develop other steps that ensure the continued high standards that we aspire to. While the demands of service to the legal profession are significant, the experience has been a rich and rewarding one.

Thank you for the opportunity to serve as the President of the Law Society of Alberta.

Law Society of Alberta

Vision

The Law Society of Alberta will be recognized as a model for protecting the public interest and preserving the fundamental principles of justice through a self-regulated, independent and trusted legal profession.

Mission

To serve the public interest by promoting a high standard of legal services and professional conduct through the governance and regulation of an independent legal profession.

Supporting the Competence of Regulated Members

Don Thompson, QC, Executive Director

GOAL 1:

To serve the public interest by promoting and ensuring high ethical standards and high standards of competence on the part of all those seeking admission to and practicing law in Alberta.

GOAL 2:

To preserve and demonstrate the value of a self-regulated and independent legal profession.

GOAL 3:

To uphold and preserve the fundamental principles of justice, including the rule of law, the independence of the bench and bar, effective and equal access to justice and to promote equity and diversity in the legal profession.

The Law Society of Alberta supports the competence of its regulated members and pays attention to developments in other law societies.

In Alberta we support the competence of lawyers through CPLED (the bar admission program), CLE, practice advice, the Equity Ombudsperson, libraries, the Alberta Law Review, Assist, our developing program for continuing professional

development, environmental scanning, practice review and loss prevention.

The 2007 budget provided for new staff resources in the area of quality assurance, standards and professional development. Keeping in mind our strategic priorities, and the vision articulated by the Benchers, we have explored, planned and implemented programs and activities to fulfill these areas.



Don Thompson, QC

Issue	Accomplishments To Date
1 Continue working on issues of safety of trust property and compliance audits.	<ul style="list-style-type: none"> A national working group now established on trust accounting. They are working on a project to collect data about trust accounting and trust theft, as well as a project plan for dealing with a variety of issues
2 Determine length of time for matters to proceed through complaints to hearing, and make necessary changes to meet those timelines.	<ul style="list-style-type: none"> Goals for informal and formal complaints have been set.
3 Determine what LSA is trying to accomplish in the area of unauthorized practice.	<ul style="list-style-type: none"> Completed in December 2005. We will prosecute where an unauthorized practitioner is a risk to the public.
4 Move ahead with continuing professional development issues	<ul style="list-style-type: none"> The program design has been agreed upon, and the implementation plan is underway.
5 Determine strategy around communication issues	<ul style="list-style-type: none"> In February 2006, the Benchers adopted the strategy developed by the Communications Committee.
6 Determine what services ASSIST will provide and associated costs.	<ul style="list-style-type: none"> Completed for 2006-2007, and incorporated into budget
7 Explore what should be done in addition to the already identified approach to pro bono work.	<ul style="list-style-type: none"> Pro Bono Law Alberta has been launched. The Board is moving forward with the plan and the Advisory Board has been struck.

Sustainability of Law Society Means Better Access to Justice

Beginning with 144 lawyers in 1907, and growing to an active membership of 8,000 lawyers 100 years later, the Law Society of Alberta is building on its past accomplishments and rising to its future challenges.

We've come a long way in 100 years — yet we continue to address the changing needs of the public, and how we can best serve those interests. This is our centennial year, of which we can all be proud. There will be, and have been, a variety of celebratory events to mark this milestone in our history. This is also a time to take stock of what

we have accomplished, and look ahead to where we want to go, and what we see developing in the future.

As lawyers and as Canadians we tend to take for granted the rule of law, and the role of our profession in sustaining its important role in our societal interactions. Canadians rely on the law every day: it protects our rights, resolves conflict in a civilized fashion, provides orderly government, and provides certainty in commercial transactions.

At the same time, we are cognizant of how difficult it is for average Canadians to access justice. For most people, access to justice means getting advice and representation, before the courts and

in other settings. Frequently this requires access to a lawyer. But for many individuals, access to legal services is beyond their means.

What are we doing about this? The Law Society of Alberta has a long history of working to increase access to legal aid. As our centennial legacy project, we have launched Pro Bono Law Alberta, a network to facilitate even more pro bono work by lawyers, and to find innovative pro bono projects between partners. We are working with other law societies across Canada to explore increases in the supply of legal services for ordinary Canadians.

We also support the competence of our regulated lawyers, through the Alberta bar admission course, continuing legal education and professional

development, practice advice, the equity ombudsperson, law libraries, the Alberta Law Review, a short-term counselling and referral program, environmental scanning to identify best practices, practice review and loss prevention.

We have much to be proud of in the past 100 years of service by the legal profession. While there are challenges ahead, our record of addressing emerging issues in relevant and meaningful ways shows that we are up to the challenge.

The Law Society of Alberta has been a leader in regulating the legal profession in Canada and internationally, and we intend to continue to hold ourselves to the vision of being a model regulator.

Pro Bono Law Alberta Network Launched

Pro Bono Law Alberta was launched to Alberta's legal profession as the legacy project celebrating the 100th anniversary of the Law Society of Alberta. The not-for-profit network was launched in two cities — in Calgary on May 23 and in Edmonton on May 24.

Jim Peacock, QC, President of the Law Society of Alberta, announced a \$200,000 contribution to set up and implement the legacy project. A contribution by the Alberta Department of Justice to our Society centennial was directed to PBLA and matched by the Law Society of Alberta. The Alberta Law Foundation has provided a grant of \$200,000 for the establishment of Pro Bono Law Alberta.

The new society will enable lawyers to participate more easily, more effectively and more creatively in access to justice as an independent legal profession. A Board of Directors and an Advisory Board was established.

Pilot Project to Test Cheque Imaging Services

The Law Society of Alberta embarked on a pilot project in 2007 to test cheque imaging services. The Canadian Payments Association set the new deadline for new cheque specifications to September 2, 2008. In August 2008, the Association will begin to implement electronic cheque imaging. Chinook Credit Union initiated this project with the Law Society in order to better understand the impact of changes to cheque specifications on lawyers' trust accounts. At the end of the project, it is hoped that there will be an image statement service that accommodates lawyers' requirements.

Bottom Left Photo: Attendees of the PBLA launch in Edmonton on May 24 included, (from left): Jim Peacock, QC, President, LSA; The Honourable Judge A.H. Lefever; Suzanne Alexander-Smith, Director, PBLA; Terry Matchett, QC, Alberta Deputy Minister of Justice; John Henderson, QC, Vice-President, PBLA; Susan Billington, Acting Executive Director, PBLA; Rod Jerke, QC, President, PBLA and LSA Bench.

Continuing Professional Development Plans Required

The Benchers have approved the implementation of a Continuing Professional Development (CPD) program for all active members of the Law Society of Alberta. This will come into effect by March 2009. The new program will require the preparation of annual CPD plans. Lawyers will develop their plans and advise the LSA on an annual basis that they have been completed. Plans will be submitted only on LSA's request.

Bottom Right Photo: The 2007 Media and Law Seminar, held November 16, 2007 in Calgary included facilitator Paula Todd, and panellists (from left to right) Gerry Nichols of the Democracy Institute; Bob Bragg, Mount Royal College communications professor; and David Cohn, Editor of NewAssignment.net.

Media and the Law Seminar 2007—“Bans, Blogs and Boundaries”

Guest speaker Ian Hanomansing, anchor of CBC News: Canada Now drew upon his own experiences in speaking about reporting news within the current legal framework. In speaking about “Bans, Blogs and Boundaries” at the 2007 Media and Law Seminar, he echoed many of the experiences shared by the panellists in the three sessions.

Moderated by Paula Todd of CTV's The Verdict, the seminar explored the uneasy marriage between the courts and the media, using the Medicine Hat triple murder trial as a case study. One panel discussion focused on courthouse journalism, American style and discussed current electronic access to justice. Another panel challenged citizen journalism and the rise of internet reporting. The ground floor foyer of the new Calgary Courts Centre was the venue for the 2007 Media and Law Seminar.



2007 Viscount Bennett Scholarship Winners

With experience spanning three continents, Calgary barrister and solicitor Erica Bach is poised to return to university as one of two recipients of the 2007 Viscount Bennett scholarship.

The second recipient is Adam Douglas of Calgary who is completing his Master of Laws from Columbia University where he is focusing on the reconciliation of commercial interests and human rights in developing countries.

Ms. Bach obtained her law degree from Dalhousie University, and is enrolled as a candidate for a dual degree of LL.M. in law and the global economy at New York University School of Law and National University of Singapore.

Since being admitted to the LSA bar in 2003, her work experience includes stints as an associate with Macleod Dixon LLP in Calgary, visiting lawyer with Lawyers for Human Rights in South Africa, programs lawyer with the Law Society of Zimbabwe in Harare, and legal specialist with the UN Development Program in Mozambique.

Recently she served as a national leader for Ship for World Youth, sponsored by the Government of Japan, and served as the Canadian national office coordinator and director for Lawyers without Borders

Born and raised in Calgary, Mr. Douglas earned his LL.B from the University of Western Ontario in 2005, a Masters of Arts degree from the University of Essex in 2001, and his Bachelor of Arts degree from Trinity Western University in 2000. Prior to studying law, Adam worked for an international human rights organization in Washington, D.C and Nairobi, Kenya.



Peter Freeman Bursary Recipients

Two Alberta university law students were awarded the Peter Freeman, QC Bursary for Indigenous Students in Law.

Brandon Tralenberg has completed his second year in the Faculty of Law with a 2.7 grade point average. He received a \$2,000 bursary.

Shaun Emes, who received a \$1,000 bursary, completed his first year in the Faculty of Law with a 2.7 grade point.

Each year the bursary is awarded to one student at the University of Calgary and one student at the University of Alberta enrolled in the faculty of law who are of aboriginal descent.

The bursary was created by the Law Society of Alberta in 2001 in honour of Peter Freeman, QC, who served as the executive director from 1989 until his retirement in 2001. The principal amount for the bursary was established through generous donations from the legal community and the Law Society of Alberta.

W.B. Kelly, Q.C., Memorial Prize Recipients

The 2007 W.B. Kelly, QB Memorial Prize winners are Daniel Walter Shea of the University of Calgary, and Vista Pourbahrani of the University of Alberta.

This award is given to students of good academic standing who have performed with distinction in a skills training or professional responsibility and ethics course (or program) in the law faculties of the University of Calgary and the University of Alberta.

The late William Bernie Kelly, Q.C. served as the Law Society of Alberta's deputy secretary, secretary-treasurer (executive director). In 1989, an endowment was established in Mr. Kelly's name to honour his contributions to the LSA and recognize his interest in encouraging a high level of legal education and practice in Alberta.



2007 Executive Committee

Back row (left to right): Dale Spackman, QC; Norma Sieppert (lay benchner); Rod Jerke, QC; and Don Thompson, QC (Executive Director) **Front row (left to right):** Bradley Nemetz, QC; Perry Mack, QC (President Elect); Jim Peacock, QC (President); and Vivian Stevenson, QC.



2007 Benchers of the Law Society of Alberta

Back row (left to right): Steve Raby, QC; Dean David Percy (University of Alberta); Rod Jerke, QC; Larry Ohlauer (lay benchner); Brian Beresh, QC; Dale Spackman, QC; Ron Everard, QC; and John Higgerty, QC. **Middle row (left to right):** John Prowse, QC; Wayne Jacques (lay benchner); Doug Mah, QC; Michelle Crighton, QC; Yvonne Stanford (lay benchner); Julia Turnbull, QC; Vivian Stevenson, QC; Neena Ahluwalia, QC; and Hugh Sommerville, QC. **Front row (left to right):** Norma Sieppert (lay benchner); Bradley Nemetz, QC; Carsten Jensen, QC; Perry Mack, QC (President-Elect); Jim Peacock, QC (President); Don Thompson, QC (Executive Director); Shirley Jackson, QC; and Peter Michalyszyn, QC. (Missing is Vaughn Myers, QC.)

Humble Roots Give Rise to 50 Years of Lawyering

In 1957, the Honourable Ernest C. Manning was the Alberta premier, the population of Calgary was almost 200,000, and the Law Society of Alberta had a cumulative membership of 1844, 791 of whom were active in 1957.

Fast forward to 2007, the Law Society of Alberta commemorated 50 years of service to the Alberta legal profession by 13 lawyers. Not only do these 13 lawyers share the same bar admission date (1957), they were part of an era of lawyers who remained steadfastly loyal to one firm.

On October 24, 2007 in Calgary, Jim Peacock, QC, President, presented 50-year service certificates to:

- Honourable Mr. Justice D.B. Mason,
- Henry Beaumont, QC
- W. Gordon Brown, QC
- Bill Code, QC and
- Paul Havelock.

At the Long Service awards in Edmonton December 5, 2007, Jim Peacock, QC, President presented 50-year service certificates to:

- Honourable Mr. Justice J.A. Agrios,
- Sydney A. Bercov, QC
- Honourable Judge J.R. Bradley,
- Judge Donald Ingram,
- Honourable Mr. Justice Erik S. Lefsrud,
- Honourable Justice W.E. Wilson,
- Honourable Judge S.E.W.J. Wood,
- Paul Haljan and
- Jim Redmond, QC.

Excellence in Legal Profession Celebrated

For volunteering to do pro bono work in the Edmonton community, addressing homelessness in Calgary, contributing to the importance of mediation in the legal profession, and advancing legal academic knowledge, four lawyers were recognized for distinguished service during the Alberta Law Conference.

Law Society of Alberta President-Elect Perry Mack, QC and Canadian Bar Association Alberta president Scott A. Watson presented the Distinguished Service Awards. These are awarded jointly by the Law Society of Alberta and the Canadian Bar Association.

DSA for Legal Scholarship - Nicholas Rafferty's contributions to the legal and academic fields have spanned more than 30 years. He is currently a Professor with the Faculty of Law at the University of Calgary and has contributed significantly to the Alberta legal community, most notably in the area of contract law.

DSA for Service to the Community - Brian O'Leary, QC, a partner with Burnet, Duckworth & Palmer LLP, has given over 31 years of service to his community, including his extensive work with the homeless population in Calgary. He was elected director of the Calgary Homeless Foundation in 2001 before becoming Founding Chairman of the Calgary Community Land Trust Society.

DSA for Service to the Profession - Sandra Schulz, QC has touched many lives in her career as a chartered mediator. She is currently working as a Mediation Program Advisor and Coordinator for the Court of Queen's Bench of Alberta Civil Mediation Project, among her other professional endeavours.

DSA for Pro Bono Legal Service - Ronald Hopp's career is marked by an unwavering dedication to give back to the community. Since 1976, he has provided endless hours of pro bono legal service to Student Legal Services of Edmonton, routinely working 30 hours a month of unpaid time. He is now a Professor Emeritus at the University of Alberta's Faculty of Law.



The 2007 Distinguished Service Awards were presented in Edmonton on March 16, 2007 to Ronald G. Hopp (left), Brian P. O'Leary, QC (centre) and Nicholas Rafferty (right). (Missing is Sandra Schulz, QC)



Long service award recipients in Calgary from top left, clockwise: Henry Beaumont, QC; Jim Peacock, QC, President, Law Society of Alberta; Bill Code, QC; Justice Blair Mason; and Gordon Brown, QC.



Long service award recipients in Edmonton from top left, clockwise: Justice W.E. Wilson, Judge J.A. Agrios, Sydney Bercov, QC, Mrs. Loveth Bradley (on behalf of Judge J.R. Bradley), Justice Erik Lefsrud, and Judge S.E.W.J. Wood. (Missing are: Judge Donald Ingram, Paul Haljan and Jim Redford, QC)



Fort McMurray Courthouse Plaque Unveiling - A plaque commemorating the 100th Anniversary of the Court of Queen's Bench was unveiled in Fort McMurray on June 19, 2007. From left to right are: Scott Watson, now past president of the Canadian Bar Association - Alberta; the Honourable A.H.J. Wachowich, Chief Justice of the Court of Queen's Bench; Jim Peacock, QC, President of the Law Society of Alberta; and the Honourable Neil Wittmann, Associate Chief Justice, Court of Queen's Bench.



Following the plaque unveiling, the members of the Fort McMurray Bar Association gathered with visiting judiciary and Law Society of Alberta representatives for this group photo on June 19.



The Court of Queen's Bench of Alberta unveiled plaques in each of four northern courthouses — Peace River, Grande Prairie, St. Paul (above) and Fort McMurray between June 12 and June 19, 2007. Presenting the plaques in these photos were the Honourable A. H.J. Wachowich, Chief Justice, and Jim Peacock, President of the Law Society of Alberta.



The Court of Queen's Bench judiciary and the Law Society of Alberta representatives joined members of the St. Paul Bar Association in this group photo on June 18, 2007. Seated (from left to right) are: Jim Peacock, President of the Law Society of Alberta; Justice Colleen Kenny; Justice Paul Belzil; Chief Justice A.H. J. Wachowich; Justice Vitale Ouellette; and Justice Paul Marceau.



Grande Prairie Bar Association members joined visiting judiciary and representatives of the Law Society of Alberta for this group photo on June 14, 2007 at the local courthouse.



At the Grande Prairie plaque unveiling and regional bar gathering, Barbara Hookenson, Assistant Deputy Minister, Court Services, Alberta Justice was among the speakers.



Peace River Bar Association members gathered with visiting judiciary and representatives of the Law Society of Alberta for this photograph at the local courthouse on June 12, 2007.



On October 2, 2007, members of the Wetaskiwin Bar Association gathered with visiting judiciary and representatives of the Law Society of Alberta to unveil a Court of Queen's Bench plaque in honour of the joint centenaries of the LSA and CQB.



A Court of Queen's Bench plaque was unveiled in Drumheller on September 26, 2007 in front of members of the Drumheller Bar Association and visiting judiciary and Law Society of Alberta representatives.



Lethbridge Bar Association photo taken October 25, 2007



Medicine Hat Bar Association photo taken November 14, 2007



Calgary Bar Association photo taken November 15, 2007 on Stephen Avenue SW, Calgary, Alberta



Edmonton Bar Association photo taken October 4, 2007 inside Edmonton City Hall, Edmonton, Alberta.



Contributing author and Professor Emeritus Louis Knafla spoke to the community contributions made by the legal profession in Alberta over the past century.



Just Works: Lawyers in Alberta 1907-2007 was unveiled by the 100th Anniversary book planning committee members. From left to right: Stacy Kaufeld of Legal Archives Society of Alberta; Ev Bunnell, QC; Justice Jack Watson, book committee chair; Jim Peacock, QC, President, Law Society of Alberta; and Professor Louis Knafla.



Harry Arthurs, former Dean of Osgoode Hall Law School and former President of York University, opened the 100th Anniversary conference at the University of Alberta in Edmonton.



Jim Peacock, QC, President, Law Society of Alberta joined stamp designer Xerxes Irani and Joanne Reid, Manager of Retail Business for Canada Post, in unveiling the 100th Anniversary commemorative stamp September 13, 2007 in Edmonton.



Court of Queen's Bench Chief Justice A.J. Wachowich and Jim Peacock, QC, unveiled this commemorative 100th anniversary plaque in Wetaskiwin, Alberta. The Court of Queen's Bench marked their centennial by presenting most courthouses in Alberta with a plaque, each entitled, "Serving Justice for 100 years".



The Honourable A. Anne McLellan, keynote speaker at the 100th Anniversary Conference, spoke of the challenges facing women lawyers in the profession. The conference, entitled, "Canadian Lawyers in the 21st Century" explored issues facing lawyers.



Edmonton lawyer Analea Wayne opened the 100th Anniversary gala dinner by singing the Canadian anthem, "O Canada", shown in Calgary on the large screen. The dinner program, featuring keynote speakers Chief Justice Beverley McLachlin and the Honourable Peter Loughheed, was simulcast. Nearly 1600 people attended the two-city gala dinner.



The Canadian anthem was performed by Edmonton lawyers, Analea Wayne singing, Scott Watson playing the trumpet, and Gary Cable on the piano (not shown).

Before the start of the 100th Anniversary Gala Dinner, guests had an opportunity to meet, mingle and look over the exhibits prepared by Legal Archives Society of Alberta. In Edmonton were, left to right: Master of Ceremonies Jim Wachowich; Cheryl Peacock; Jim Peacock, QC, President of the Law Society of Alberta; Chief Justice Beverly McLachlin and her husband, Frank McArdle; and Don Thompson, QC, Executive Director of the Law Society of Alberta.



Lieutenant Governor Norman Kwong proposed a toast to the Law Society of Alberta during his appearance at the 100th Anniversary Gala Dinner.



100th Anniversary gala dinner master of ceremonies in Calgary was Allan G.P. Shewchuk, QC of Machida Mack Shewchuk Meagher who took a moment to celebrate with LSA Benchers Stephen Raby, QC. He joined Edmonton master of ceremonies, James Wachowich, by satellite broadcast.



The Honourable Peter Loughheed met with colleague the Honourable Kenneth Moore prior to the start of the 100th Anniversary gala dinner. Mr. Moore gave the introduction to Mr. Loughheed in Calgary.

Report on Regulation: Balancing Fairness with Timeliness In Resolving Complaints

By Bradley G. Nemetz, QC, Benchers and 2007 Chair, Conduct Committee



Bradley G. Nemetz, QC

Last year Mr. Perry Mack reported on the creation of guidelines and benchmarks with respect to the timing and completion of investigations. During 2007, the Law Society worked hard to balance fairness with timeliness in response to complaints and in the processing of complaints through to hearings.

The Conduct Department reviewed its internal statistics and processes concerning the time that it takes to process a complaint from commencement of the formal complaint (one that cannot be resolved by a telephone call or mediation) to the conclusion of the Conduct Department's activities with a dismissal of the complaint or with the complaint being referred to a Conduct Panel.

The Conduct Panels are comprised of three members of the Conduct Committee. Those panels decide whether the conduct is such that citations should be brought against the member.

Complaints vary in complexity. The Law Society set

as a goal to have two-thirds of formal complaints concluded (i.e. dismissed or referred to a Conduct Panel for charges) within one year. Additional staff was hired to achieve that goal. The backlog of formal complaints continues to be addressed through the increased staffing model. Improvement has occurred in the timeliness of completion of the complaints. However, the goal of 67% concluded in one year or less has not yet been achieved. Continued improvement towards meeting that goal is expected over the coming year.

The statistics published with this report show that:

- The Law Society's commitment to a compliance culture has resulted in increased activity in the entire complaint process, and increased formal complaints. Investigations and audits have resulted in an overall increase in the number of matters that are processed through the discipline process.

- The increased staffing model and the efforts in reducing the backlog has resulted in increased activity in all levels of the complaint process through to hearings.

The Law Society believes that the timely processing of complaints is an important aspect of its role as regulator. Prompt processing of complaints is important to all parties involved. The Law Society's reputation as a regulator is harmed if complainants see their issues languish. Complainants are harmed by not having their matters brought to a timely conclusion and, from the standpoint of members, it is in their interest to have investigations proceed expeditiously to a conclusion regardless of the eventual outcome.

The Law Society believes that it has set a realistic goal and that it is on track to meet that goal.

Conduct Department Statistics

Compiled May 21, 2008

	2007	2006	2005
General Inquiries and Complaints Received by Complaints Officers	3373	2875	3188
Opened as Formal Complaints	431	330	305
Complaints by the public	246	184	165
Complaints by lawyers	62	80	27
Complaints initiated by LSA	123	92	60
Dismissed at Administrative Level	156	164	81
Directed to Investigation	79	77	76
Referred to Conduct Committee Panel	146	109	29
Dismissed by Conduct Committee Panel	40	35	16
Directed to Hearing	69	68	51
Directed to Mandatory Conduct Advisory *	34	16	10
Directed to Practice Review	7	9	6

Hearing Statistics

Compiled May 21, 2008

	2007	2006	2005
Number of lawyers suspended (under section 63) **	3	5	9
Hearings Directed	39	69	31
Completed Hearings	30	37	24
Number of lawyers suspended	7	7	6
Number of lawyers disbarred	3	3	2
Number of lawyers who resigned in the face of discipline	1	4	1

Conduct Hearings

Year	Hearings Ordered
2003	31
2004	34
2005	31
2006	46
2007	69

Membership Trends

Year	Active	Inactive
2003	7345	1671
2004	7554	1663
2005	7711	1701
2006	7967	1700
2007	8182	1784

* informal discipline process

** suspended pending outcome of an investigation

Corporate Information

The Law Society of Alberta is the self-regulating body of Alberta's lawyers. In addition to a 24-member board of directors, called Benchers, the LSA is administered by a 105 person staff complement, of which 80 work in Calgary and 25 work in Edmonton.

Overseeing the administration of the LSA is a management committee consisting of Don Thompson, Q.C., Executive Director; Greg Busch, Director of Lawyer Conduct; Janet Dixon, Q.C., Senior Counsel; Lisa Sabo, Director of Insurance; Nona Cameron, Director of Human Resources; and Drew Thomson, Director of Corporate Services.



Carsten Jensen, QC

Assurance Fund Project Ends with New Rules and Guidelines

By Carsten Jensen, QC, Benchers and 2008 Chair, Finance Committee

During 2007, the Law Society completed a comprehensive Assurance Fund project designed to improve the Assurance Fund claims process. The Assurance Fund is the Law Society's program for compensation of clients where there has been misappropriation or wrongful use of trust funds, and it is an important part of our efforts to maintain public confidence in the legal profession.

This project culminated in Law Society rule changes and a new set of guidelines, now adopted by the Benchers. These changes are all designed to make the Assurance fund process faster, more user-friendly and more transparent. In future, decisions of Assurance Fund claims panels will, ordinarily, be available to the public.

Law Society fees were set at \$1,160 for 2008 (a 5.9% increase from 2007), and the Assurance Fund levy remained unchanged from 2007 at \$635. The increase in the general levy results from inflation, and some increased expenditure on the risk management initiatives undertaken by the Law Society.



Shirley A. Jackson, QC

Equality, Equity and Diversity Committee Achievements

By Shirley A. Jackson, QC, Benchers and 2007 Chair

Two key projects became the priorities in 2007 for the Equality, Equity and Diversity Committee. The first was developing and delivering presentations to law firms on the business case for diversity management. The second project was to begin updating policies. This was started in 2007, but needs to be continued.

Overall, the Equality, Equity and Diversity Committee accomplished the following achievements in 2007:

- a. Equity Ombudsperson Greg Francis completed his Outreach powerpoint presentation and delivered it to several Alberta law firms.
- b. The Aboriginal Summer Student Program process was started earlier for the 2008 summer as the committee was advised that law firms start their arrangements for summer students the previous fall. We received a commitment from several law firms to participate and students wishing to participate.
- c. Committee member Jo-Ann Kolmes presented the committee with her analysis of a number of areas in the maternity/paternity model policy.

d. Greg Francis advised that the Law Society of Alberta has adopted the Respectful Workplace Policy.

e. The committee had four working groups:

1. Outreach and Education — to develop educational programs for the Legal Profession
2. Aboriginal Program development — to continue the work of the Aboriginal Summer Student Program and explore other programs
3. Model Policy review — to revise current policies and develop the working relationships policy for the profession
4. Demographics — to develop an approach to the gathering of demographic information regarding a variety of diversity indicators in the legal profession. (This group was added this year to consider adding demographic questions to forms in order to get a better picture of the membership.)

f. Greg Francis prepared and reviewed the Exit Survey and presented the findings.



Vivian Stevenson, QC

Education and Credentialing Process Streamlined

By Vivian Stevenson, QC, Benchers and 2007 Chair, Credentials and Education Committee

In 2007 the C&E Committee completed its rewrite of the Rules and Guidelines which apply to the Committee in accordance with Part 2 of the Legal Profession Act. The two main goals of the redraft were:

1. to implement a standard decision-making structure under which the Executive Director would initially determine an application in most cases, with a right of appeal to a panel composed of three C&E Committee members; and
2. to add an investigation power and improve the rules regarding the initial determination and hearing process in order to enhance consistent and informed decision-making.

The new Rules and Guidelines will come into effect in 2008.

In addition to this policy work, the Committee continued to perform its usual work under Part 2 of the Act. The Committee heard a number of applications. The following is a list of the number and type of matters that were dealt with by the Committee in 2007.

In 2007 the Committee also began to address an alternative assessment mechanism to the written reinstatement exams that LESA had previously administered to applicants who were directed to write reinstatement exam. Among other options, the Committee is considering whether it may be possible to use CPLED or elements of CPLED.

The Committee continued to monitor feedback with respect to the CPLED Program and to work with LESA to address concerns that have been raised. Work has been started on a communications strategy to ensure that students, principals and firms have a clear understanding of CPLED policies and procedures.

Every year the Committee receives some negative feedback about the recruiting rules. This year was no exception. Whether there is a significant problem is unclear, particularly since the CBA has suggested that they are not hearing any complaints either in Edmonton and Calgary. An article requesting feedback on two areas of recurring complaints was published in the Advisory.

Reinstatement applications	Rule 118	28
Application to waive compliance (Certificate of Principal)	Rule 58(2)	2
Application for continuation of membership	LPA s.42	4
Application to waive academic requirement	Rule 50(5)	4
Application to backdate articles	Rule 54(1)(d)	2
Application for abridgement of articling period	LPA s.37(4)	4
Suitability of Principal	Rule 55(4)	1
CPLED appeals	Rule 64.1	3
Good character & reputation	Rule 51.1	2
Application for academic membership	LPA s.45	1

2007 STANDING COMMITTEES

APPEAL

Jim Peacock (President)
Perry Mack (President-Elect)
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Law Society of Alberta

Condensed Financial Statements October 31, 2007

To the Members of the Law Society of Alberta

The accompanying summarized balance sheet and statement of revenue, expenses and fund balances are derived from the complete financial statements of The Law Society of Alberta as at October 31, 2007 and for the year then ended on which we expressed an opinion without reservation in our report dated April 10, 2008. The fair summarization of the complete financial statements is the responsibility of management. Our responsibility, in accordance with the applicable Assurance Guideline of The Canadian Institute of Chartered Accountants, is to report on the summarized financial statements.

In our opinion, the accompanying financial statements fairly summarize, in all material respects, the related complete financial statements in accordance with the criteria described in the Guideline referred to above.

These summarized financial statements do not contain all the disclosures require by Canadian generally accepted accounting principles. Readers are cautioned that these statements may not be appropriate for their purposes. For more information on the entity's financial position, results of operations and cash flows, reference should be made to the related complete financial statements.

PricewaterhouseCoopers LLP

PricewaterhouseCoopers LLP
Chartered Accountants
April 10, 2008

Condensed Balance Sheet

As at October 31, 2007

	2007	2006
Assets		
Current assets	\$ 9,102,721	\$ 5,997,822
Investments	7,966,412	6,404,692
Reinsurance recoverables	6,530,806	5,844,287
Trust assets	513,976	394,259
Capital assets	1,331,433	1,553,531
Total Assets	25,445,348	20,234,591
Liabilities		
Current liabilities	\$ 1,653,793	\$ 1,584,960
Reserve for claims and related costs	9,823,624	8,860,083
Pension Plan payable	400,112	332,436
Trust liabilities	513,976	394,259
Deferred lease inducement	554,285	678,752
Total Liabilities	12,945,790	11,850,490
Fund Balances		
Invested in capital assets	\$ 1,331,433	\$ 1,553,531
Externally restricted funds		
Contingency reserve	6,053,511	2,512,632
Scholarship reserve	1,261,727	942,364
Unrestricted funds	3,852,887	3,375,574
Total Fund Balances	12,499,558	8,384,101
Total Liabilities and Fund Balances	\$ 25,445,348	\$ 20,234,591

Condensed Statement of Revenue, Expenses and Fund Balances

the Year Ended October 31, 2007

	2007	2006
Revenue		
Practise fees	\$ 14,677,924	\$ 12,147,087
Investment income	969,406	1,355,947
Management fee	871,570	798,610
Enrolment and application fees	405,960	348,493
Other	109,068	89,868
Fines and penalties	27,432	39,851
Total Revenue	17,061,360	14,779,856
Expenses		
Corporate costs	\$ 3,298,469	\$ 3,076,811
Departments, programs & committees	10,128,629	9,133,451
Grants and contributions	1,367,077	1,248,055
Provision for claims and related costs	518,451	493,377
Scholarships	40,000	15,000
Total Expenses	15,352,626	13,966,694
Excess of revenue over expenses for the year	\$ 1,708,734	\$ 813,162
Fund Balances - beginning of year	8,384,101	7,570,939
Transitional adjustment on adoption of new accounting policies	2,406,723	-
Fund Balances - end of year	\$ 12,499,558	\$ 8,384,101

The Alberta Lawyers Insurance Association

Condensed Financial Statements June 30, 2007

To the Directors of The Alberta
Lawyers Insurance Association

The accompanying summarized balance sheet and statement of revenue, expenses and net assets are derived from the complete financial statements of The Alberta Lawyers Insurance Association as at June 30, 2007 and for the year then ended on which we expressed an opinion without reservation in our report dated December 6, 2007. The fair summarization of the complete financial statements is the responsibility of management. Our responsibility, in accordance with the applicable Assurance Guideline of The Canadian Institute of Chartered Accountants, is to report on the summarized financial statements. In our opinion, the accompanying financial statements fairly summarize, in all material respects, the related complete financial statements in accordance with the criteria described in the Guideline referred to above.

These summarized financial statements do not contain all the disclosures required by Canadian generally accepted accounting principles. Readers are cautioned that these statements may not be appropriate for their purposes. For more information on the entity's financial position, results of operations and cash flows, reference should be made to the related complete financial statements.

PricewaterhouseCoopers LLP
PricewaterhouseCoopers LLP
Chartered Accountants
December 6, 2007

Condensed Balance Sheet

As at June 30, 2007

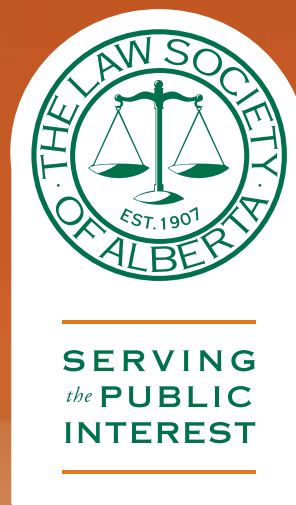
	2007	2006
Assets		
Current assets	\$ 17,121,522	\$ 17,772,042
Investments	72,688,387	64,429,132
Capital assets	35,109	18,948
Total Assets	89,845,018	82,220,122
Liabilities		
Current liabilities	\$ 11,183,656	\$ 12,771,088
Reserve for claims and related costs	43,212,867	43,510,000
Total Liabilities	54,396,523	56,281,088
Net Assets		
Unrestricted	\$ 35,448,475	\$ 25,939,014
Share Capital	20	20
Total Net Assets	35,448,495	25,939,034
Total Liabilities and Net Assets	\$ 89,845,018	\$ 82,220,122

Condensed Statement of Revenue, Expenses & Net Assets

For the Year Ended June 30, 2007

	2007	2006
Revenue		
Annual levy	\$ 12,693,669	\$ 15,417,089
Investment income	10,964,911	8,484,221
Total Revenue	23,658,580	23,901,310
Expenses		
Provision for claims and related costs	\$ 9,677,132	\$ 10,267,074
Premium paid to CLIA	2,003,328	2,580,656
Operating expenses	2,456,209	2,362,281
Loss prevention	12,450	46,540
Total Expenses	14,149,119	15,256,551
Excess of revenue over expenses for the year	\$ 9,509,461	\$ 8,644,759
Unrestricted Net Assets - beginning of year	25,939,014	17,294,255
Unrestricted Net Assets - end of year	\$ 35,448,475	\$ 25,939,014

A copy of the complete financial report for LSA and/or ALIA is available at www.lawsociety.ab.ca or by contacting W.C. (Bill) Wakefield, Controller, The Law Society of Alberta, 500, 9191-11th Avenue SW, Calgary, Alberta T2R 1P3 or bill.wakefield@lawsociety.ab.ca



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Front Page Photo - Past and Present Benchers of the Law Society celebrated the 100th Anniversary at a Benchers gathering May 26, 2007 at the Lougheed House in Calgary Alberta.

Front row (left to right): Ken Nielsen, Jack Agrios, Bill Sowa, Bob Fraser, Russ Dixon, Mac Jones, Herb Laycroft, Jim Peacock, Perry Mack, Milt Harradence, Peter Martin, Ged Hawco, Virgil Moshansky, Jack Holmes and Bill Code

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