**Note:** This template is an optional resource principals can use in the articling process. The Principal Training Course provides for proper context and use of this template, and this template should only be used after the principal has completed the Course. Principals can download this template and adopt any or all portions as they see fit when developing their own Articling Learning Plan template. **This template is provided as an optional resource and its use is not mandatory.**

**Articling Learning Plan Template**

Principal: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Student: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

First date of articling term: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last date of articling term (if known): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Part I: General Resources**

The principal and the student (hereinafter collectively referred to as “we”) have reviewed and completed the attached checklist of general resources to support the student in their articles.

**Part II: Learning Objectives**

*Principals are required to ensure students obtain practice experience, training and mentoring in five key competency areas during the articling term. Learning objectives for each competency, which the student is required to achieve by the time they apply to be admitted as a member of the Law Society, are identified in the* [Education Plan](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/02/23174232/form_2-5_2-6.pdf)*, along with examples of learning activities that can be completed to support the learning objectives. Below are starter lists for each competency where learning activities, specific resources to support the student, goal dates for completion, and dates activities were successfully completed can be recorded. You can add rows to each table as needed (to do this right click within the table, select insert, and select insert row below/above depending on where you want the new row to appear).*

**Learning objectives already completed:**

*(Delete or strike out if not applicable)*

We have reviewed the learning objectives set out in the Education Plan and confirm that the student has already achieved the following learning objectives through previous articling experience:

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**Learning objectives to be completed:**

*A sample learning activity has been included for each competency and learning objective for illustration purposes only. Principals and students need to identify which learning activities are appropriate to their articling arrangement when completing the below charts. The Education Plan includes some suggestions, but principals and students may also come up with their own activities.*

**Ethics and Professionalism:** At the end of the articling term, the student will be able to act ethically and professionally in accordance with the standard set by the Law Society of Alberta Code of Conduct.

|  |  |  |  |
| --- | --- | --- | --- |
| Learning Activity | Specific Resources | Goal Date for Completion | Date Successfully Completed |
| Identifying potential conflict of interest issues and observing or using a client conflict management system  | [Code of Conduct, 3.4](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/01/14211909/Code.pdf) [Law Practice Essentials, Conflicts](https://learningcentre.lawsociety.ab.ca/course/view.php?id=2) |   |  |
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**Practice Management:** At the end of the articling term, the student will be able to effectively manage time, files, finances, and professional responsibilities, as well as being able to delegate tasks and provide appropriate supervision.

|  |  |  |  |
| --- | --- | --- | --- |
| Learning Activity | Specific Resources | Goal Date for Completion | Date Successfully Completed |
| Practicing delegating tasks while providing appropriate supervision  | [Code of Conduct](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/01/14211909/Code.pdf), 6.1 [Law Practice Essentials, Delegation and Supervision of Tasks](https://learningcentre.lawsociety.ab.ca/course/view.php?id=2) |  |  |
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**Client Relationship Management:** At the end of the articling term, the student will be able to effectively manage client relationships

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| --- | --- | --- | --- |
| Learning Activity | Specific Resources | Goal Date for Completion | Date Successfully Completed |
| Reviewing, revising and/or drafting a retainer letter.  | [Law Practice Essentials, Retainers](https://learningcentre.lawsociety.ab.ca/course/view.php?id=2)[Law Society of Alberta, Interactive Retainer Letter Resource](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/01/31171650/InteractiveRetainerLetter.pdf) |  |  |
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**Conducting Matters:** At the end of the articling term, the student will be able to conduct a range of matters handled by lawyers on a regular basis.

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| --- | --- | --- | --- |
| Learning Activity | Specific Resources | Goal Date for Completion | Date Successfully Completed |
| Imposing, accepting or refusing trust conditions and/or undertakings. | [Code of Conduct, Rule 7.2-14](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/01/14211909/Code.pdf)[Law Society of Alberta, Trust Conditions Guideline Resource](https://documents.lawsociety.ab.ca/wp-content/uploads/2017/02/04230830/Trust-Conditions-Guidelines.pdf) |  |  |
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**Adjudication/Alternative Dispute Resolution:** At the end of the articling term, the student will be able to identify core elements of a dispute and resolve disputes through use of alternative dispute resolution or adjudication.

|  |  |  |  |
| --- | --- | --- | --- |
| Learning Activity | Specific Resources | Goal Date for Completion | Date Successfully Completed |
| Observing, participating in and conducting interviews and briefing of witnesses  |  |  |  |
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**Part III: Work Arrangements and Needs**

(Delete or strike out if covered at the time of hiring)

We understand that the following expectations will apply during the articling term:

*Topics can include general hours of work, location(s) where work is to be completed, who the student can obtain assistance from when the principal is unavailable or away, workplace accommodations, who is responsible for paying Law Society and PREP fees, networking opportunities, etc.*

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**Part IV: Periodic Reviews**

We agree to review this articling plan a minimum of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(at least once a month is recommended)*, to help ensure the student is on track to complete the learning activities set out in this Plan, and to have a final review near the end of the student’s articling term to confirm that all learning activities have been completed.

**Part V: Final Review**

*The following space can be used for final notes for the current principal, future principal and/or student’s reference.*

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**Resource List**

**Office Resources**

*Include links or information to Human Resources, office layout, key contacts, etc.*

**Health and Wellbeing Resources**

*Any employee health benefits could be included here.*

[Alberta Lawyers' Assistance Society](https://lawyersassist.ca/)

[CPLED Health and Wellness Resources](https://cpled.ca/students/health-and-wellness/)

[Canadian Bar Association Well-Being Resources](https://www.cba.org/Sections/Wellness-Subcommittee)

**Legal Practice Resources**

*Include links or information to internal and external precedent databases, checklists and resources that will help the student complete their work and discuss steps the student needs to take to access any password-enabled accounts.*

[CanLII](https://www.canlii.org/en/)

[Alberta Courts](https://albertacourts.ca/)

[Alberta Law Libraries](https://lawlibrary.ab.ca/)

[Alberta Land Titles and Procedure Manual](https://www.alberta.ca/land-titles-procedures-manual.aspx)

[Law Society Resource Centre](https://www.lawsociety.ab.ca/resource-centre/)

[Law Society Learning Centre](https://learningcentre.lawsociety.ab.ca/)

[Law Society's What Can a Student-at-Law Do](https://www.lawsociety.ab.ca/resource-centre/key-resources/ethics-and-professionalism/what-can-a-student-at-law-do/)

**Other Training or Networking Resources**

[Legal Education Society of Alberta](https://www.lesaonline.org/)

[The Canadian Bar Association - Alberta Branch](https://www.cba-alberta.org/Home)

[The Advocates' Society](https://www.advocates.ca/)