



**CLIENT AND LAWYER SATISFACTION WITH
UNBUNDLED LEGAL SERVICES:**

**CONCLUSIONS FROM THE
ALBERTA LIMITED LEGAL SERVICES PROJECT**

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1.0 INTRODUCTION

The issue of access to justice, and questions concerning the barriers that prevent people from accessing justice, have dominated the national dialogue on the Canadian justice system for much of the last decade. The issue of access to justice is not a new one, as Canada's former Chief Justice, Beverly McLachlin PC, put it in her introduction to the final report of the Action Committee on Access to Justice in Civil and Family Matters (2013), because "as long as justice has existed, there have been those who struggled to access it." However, this issue has taken on a fresh urgency in the last several years:

... as Canadians celebrated the new millennium, it became clear that we were increasingly failing in our responsibility to provide a justice system that was accessible, responsible and citizen-focused. Reports told us that cost, delays, long trials, complex procedures and other barriers were making it impossible for more and more Canadians to exercise their legal rights.

Two of the barriers to justice identified by the Chief Justice, cost and complexity, figure prominently in a number of recent high-profile reports on access to justice and the burgeoning phenomenon of self-representation in civil and family court proceedings, including the report of the Family Justice Working Group of the Action Committee on Access to Justice in Civil and Family Matters (2013), the report of the Canadian Bar Association's Equal Justice Initiative (2013), and the report of the National Self-represented Litigants Project (Macfarlane, 2013). These three reports, together with research conducted by the Canadian Research Institute for Law and the Family on the perceptions of Alberta lawyers and judges (Bertrand, Paetsch, Bala & Birnbaum, 2012; Boyd, Bertrand & Paetsch, 2014), establish that the number of litigants without counsel is rising and that the primary cause of self-representation is the cost of obtaining legal services. They also acknowledge the role that the complexity of court rules, court processes and the rules of evidence play in frustrating self-represented parties' effective use of the justice system.

Each of these reports proposes a number of means by which Canadians' ability to access justice can be protected and enhanced. All of them suggest, with varying degrees of certainty, that the provision of legal services by lawyers on a bit-by-bit, as-needed basis may make those services more affordable and accessible to individuals unable to hire a lawyer to handle all of their case.

Lawyers traditionally provide legal services on a contingency basis, usually for motor vehicle and personal injury cases, or at an hourly rate basis, usually for family law and commercial cases. In either fee arrangement, lawyers usually expect to handle the case from beginning to end. Although this holistic model of representation does not raise a barrier to justice in contingency cases, where the lawyer is not paid unless he or she is successful, hourly rate cases can become expensive and unaffordable very quickly. A recent national survey of family law lawyers conducted by the Institute (Paetsch, Bertrand & Boyd, 2017), for example, found that respondents estimated their average charge to clients for professional services alone, excluding disbursements, was \$12,395 for individuals engaged in low-conflict family law disputes (range=\$2,000 to \$75,000), and \$54,390 for those engaged in high-conflict disputes (range=\$5,000 to \$625,000).

The supply of legal services on a piecemeal basis is variously known as “unbundled legal services” or “unbundling,” “discrete task representation,” “limited scope retainers,” “limited service representation” and “à la carte legal services.”¹ The report of the Access to Legal Services Working Group of the Action Committee on Access to Justice in Civil and Family Matters (2012) describes this approach as recognizing “that a lawyer’s services may not be necessary for every element of a legal matter,” thus allowing clients “to retain a lawyer for only the portion of the task that requires specialized legal training.” In *The Limited Scope Retainer*, a collection of articles and comments on unbundling published by the Canadian Bar Association Alberta in 2013, Robert Harvie QC described unbundled legal services as “any retainer a lawyer accepts which does not require the lawyer to be retained to represent a client’s interests in the typically broad fashion we are used to – that is, where the lawyer is responsible for all legal aspects of a client’s matter.” A report of the Law Society of Upper Canada (2010), now the Law Society of Ontario, described unbundling as:

... the concept of taking a legal matter apart into discrete tasks and having a lawyer or paralegal provide limited legal services or limited legal representation, that is, legal services for part, but not all, of a client’s legal matter by agreement with the client. Otherwise, the client is self-represented. Some common services involve lawyers or paralegals

1. providing confidential drafting assistance,
 2. making limited appearances in court as part of the limited scope retainer,
 3. providing legal information and advice under a limited scope retainer,
- and

¹ The term “unbundled legal services,” which appears to be most commonly used in the Canadian literature, is adopted in this report.

4. providing legal services at a court-annexed program, or through a non-profit legal service program.

There is, however, a dearth of empirical research on the effect of unbundled legal services in improving access to justice, whether positive or negative. Nonetheless, recommendations aimed at improving lawyers' training in and willingness to provide unbundled legal services, and thereby the availability of such services, are included in the reports of the Family Justice Working Group, the Access to Legal Services Working Group, the Canadian Bar Association's Equal Justice Initiative and the National Self-represented Litigants Project.

It is also clear that there is substantial public demand for unbundled legal services. Julie Macfarlane, in her seminal study of the needs and experiences of litigants without counsel, found that:

... many [litigants without counsel] sought some type of "unbundled" legal services from legal counsel; for example, assistance with document review, writing a letter, or appearing in court. Relatively few were successful in accessing legal services on this basis despite a sustained effort. This was perplexing to many respondents, who could not afford to pay a traditional retainer and envisaged that they could undertake some parts of the necessary work themselves, with assistance.

and later concluded that:

Demand from clients for models of legal service beyond the [traditional] retainer arrangement is becoming deafening. This is especially clear in relation to requests for "unbundling" from personal clients who cannot otherwise afford to pay for legal services.

Kevin Feth QC, a former president of the Law Society of Alberta, wrote the following in *The Limited Scope Retainer*:

A growing segment of Canadians either cannot afford the traditional delivery model of full scope legal representation or simply do not want it. The "do it yourself" culture spurred on by the internet and social media has promoted greater self-representation. Clients increasingly want more control over their legal affairs. A "consumer focus" to the delivery of legal services compels lawyers to tailor their services to their clients' preferences. This is the new reality.

To be clear, none of the reports of the Action Committee on Access to Justice in Civil and Family Matters, the Canadian Bar Association's Equal Justice Initiative and the report of the National Self-represented Litigants Project suggest that unbundled legal services are the silver bullet that will finally slay the werewolf of inaccessible justice; if unbundled legal services can be shown to improve Canadians' ability to access justice, encouraging lawyers to provide such services is only one part of the ultimate solution.

What is most interesting about this aspect of the solution, however, is that unbundled legal services are often characterized as having a win-win impact on all justice system stakeholders. Clients are presumed to benefit, on the basis that having some legal help is better than none; courts are presumed to benefit, on the bases that the volume of litigants without counsel will decrease, and that those who remain are more likely to be better informed about processes and procedures; the state is presumed to benefit, by achieving an improvement in access to justice without having to fund costly new initiatives; and, counsel are presumed to benefit for a number of reasons, including that unbundled services are chargeable services capable of generating a profit. A number of authors of the articles in *The Limited Scope Retainer*, suggest that unbundling may:

- a) "provide enhanced job satisfaction for lawyers who do not enjoy the full scope practice model and who want to restrict the scope and demands of their practices";
- b) "empower lawyers to work part-time, or from home";
- c) "open up an existing legal practice to new clients and new service delivery models";
- d) reduce "the chances of mushrooming receivables, keeps client expectations as to billing in check," thereby reducing "one of the significant sources of client dissatisfaction with their lawyer";
- e) provide "a legal practice with reduced stress and greater satisfaction"; and,
- f) appeal to lawyers who are "mothers on maternity leave, parents of small children, or lawyers who are interested in reducing their practice or semi-retiring."

The extent to which any of these claims are accurate, however, is difficult if not impossible to establish in the absence of research on the effects on lawyers of providing unbundled legal services.

1.1 Purpose and development of the Alberta Limited Legal Services Project

The Alberta Limited Legal Services Project was formed for the primary purpose of attempting to assess the impact of unbundling on lawyers and clients, their satisfaction with providing and receiving unbundled legal services, and clients' ability to access justice. Secondary purposes of the project included:

- a) raising awareness of unbundled legal services among the Alberta bar, and normalizing the provision of legal services on this basis;
- b) creating a pool of Alberta lawyers trained and willing to provide unbundled legal services that might endure beyond the conclusion of the project;
- c) encouraging Albertans to consider using unbundled legal services to address their legal problems; and,
- d) making recommendations regarding the delivery and use of unbundled legal services.

The progenitor of the project was Robert Harvie QC, a family law lawyer practicing in Lethbridge. Mr. Harvie served as the chair of the Law Society of Alberta's Access to Justice Committee between 2014 and 2015. At the time, he also served as a member of the Advisory Board of the National Self-Represented Litigants Project and became familiar with the findings of Dr. Macfarlane's 2013 report concerning the public demand for unbundled legal services, and the potential role such services may have in improving access to justice. Considering that many lawyers, in Alberta and elsewhere in Canada, were already providing unbundled services, Mr. Harvie developed a proposal for the Law Society's Access to Justice Committee to promote unbundling and collect data to improve the delivery of unbundled legal services.

Mr. Harvie's proposal was not adopted by the Law Society. The Law Society did, however, connect Mr. Harvie with the Access to Justice Committee established by the Canadian Bar Association Alberta and its chair, Ola Malik, a lawyer for the City of Calgary. The Bar Association committee had formed a subcommittee, the Limited Scope

Retainers Working Group, for the purposes of studying and promoting unbundled legal services, encouraging the amendment of the Rules of Court and the Rules of the Law Society to accommodate unbundling and, later, implementing a pilot project based on Mr. Harvie's proposal to the Law Society's committee.

The pilot project was to have two main components, an educational website intended to explain unbundled legal services, and a roster of lawyers willing to provide unbundled legal services. The Working Group members selected to advance the pilot project on 14 October 2014 were Mr. Harvie, Joan Braun, Ed Gallagher, Cori Ghitter, Jocelyn Hill and the author, on behalf of the Institute. Members of the Working Group originally sought funding for the project from the larger Alberta law firms, and eventually from organizations including the Government of Alberta, the Law Society of Alberta and the Canadian Bar Association Alberta, all without success. A formal letter of intent seeking funding for the project, described as the "Limited Scope Retainer Assessment Project," was prepared by the Institute and submitted to the Law Foundation of Ontario's Access to Justice Fund in March 2016. The Institute was invited to provide a full application for funding, which was submitted in July 2016 and granted on 26 October 2016.

The funding application described the proposed activities of the Limited Scope Retainer Assessment Project as follows:

This two-year project will encourage lawyers and the public to consider the use of limited scope retainers where full retainer counsel is not possible, not affordable or not desired, and will assess lawyers' and clients' experience with limited scope work, providing data beyond the typical anecdotal evidence that many access to justice efforts have been based upon. The project will result in a final report that evaluates the experiences of lawyers and clients participating in the program and their perceptions of the value of limited scope services, and will make recommendations to improve the delivery and use of limited scope legal services in Alberta.

To accomplish these activities, the project design required the members of the Working Group and the Institute to:

- a) recruit as many lawyers as possible, from as many parts of Alberta as possible, to form a coordinated roster of lawyers offering unbundled legal services in as many areas of the law as possible;

- b) provide training to roster lawyers on providing unbundled legal services, including best practices, red flags and ethical considerations;
- c) establish a website to educate lawyers and members of the public about unbundled services and the existence of the project, publish information on unbundling to lawyers and the public and provide a detailed listing of roster lawyers, including their practice location, their areas of practice, the unbundled legal services they are prepared to offer and their contact information;
- d) develop resource materials to be provided to lawyers, such as a model retainer agreement, and to the public, such as a client guide to unbundled legal services;
- e) educate judges, court workers and legal clinic staff about the potential use of unbundled legal services for clients unable or unwilling to hire counsel on a full retainer, and about the existence of the project and the roster; and,
- f) develop surveys to assess lawyers' and clients' views of the unbundled legal services they had provided or received.

With funding in hand, the Institute developed, in consultation with Mr. Harvie and other members of the Working Group, the Alberta Limited Legal Services Project as the public face of the Limited Scope Retainer Assessment Project.² Over the following months, members of this group:

- a) secured the domain www.albertalegalservices.com and obtained hosting services;
- b) developed a brochure, reproduced as Appendix A, promoting the Limited Scope Retainer Assessment Project to Alberta lawyers, a poster to help lawyers promote the project to their clients and other promotional materials;
- c) spoke to local bar associations and sections of the Canadian Bar Association Alberta to educate lawyers about the project and recruit them to the roster;

² The term "limited legal services" was chosen for the project, after much discussion among the members of the Working Group, on the basis that the term was likely to more clearly and more succinctly communicate the concept of unbundling to the public than alternatives such as "unbundling" and "discrete task representation," while most lawyers would recognize "unbundled legal services" as synonymous with "limited scope services."

- d) designed and coded the project website;
- e) developed the content of the project website, partially reproduced as Appendix B; and,
- f) developed and distributed a reminder card for roster lawyers to give their clients, reproduced as Appendix C, to encourage them to complete the client survey.

On 10 March 2017, Mr. Harvie and the author provided a webinar to train roster lawyers on providing unbundled legal services, using facilities generously provided by the Law Society of Alberta. The webinar was recorded and it and the accompanying PowerPoint presentation, reproduced as Appendix D, were subsequently made available through the project website, to ensure a minimum but consistent degree of training among roster lawyers, particularly as membership in the roster was expected to grow as awareness of the project among the bar increased.

Lawyers interested in joining the roster were asked to provide a photograph of themselves, a short one- to three-sentence biography, a statement of the areas of the law they practiced, a statement of the legal services they were willing to provide on an unbundled basis and their contact information for the project website. Intake was managed through an electronic survey hosted by SurveyMonkey to ensure uniformity in lawyers' descriptions of the areas of the law they practiced and the legal services they were willing to provide. Roster lawyers were also included in the list of lawyers providing unbundled legal services maintained by the National Self-represented Litigants Project.

All roster lawyers were asked to review the resources available on the project website and watch the introductory training webinar. Lawyers' obligations to the project were described as follows on the website's "Information for Lawyers" page:

What you do

We ask that you recommend working on a limited scope basis to current and prospective clients whose circumstances are suitable for limited scope work. Ideally, we would like you to take at least one file on a limited scope basis every three or four months, however this is *not* a requirement of participation in the project. Ultimately, the client and the nature of the client's problem will dictate whether limited scope work, versus a full retainer, is appropriate.

You will provide your services on limited scope files *at your usual rate*, whether hourly or flat. *No discount or other consideration is required.*

The Alberta Limited Legal Services Project and its website formally launched on 18 April 2017 with an initial roster of 43 lawyers, and a press release, reproduced as Appendix E, that was distributed to local, provincial and national media.

Following the launch of the project, clients and roster lawyers were asked to complete a survey on their experiences after any legal problem being addressed on an unbundled basis had concluded, whether or not the client had come to the lawyer as a result of the project; lawyers were later asked to complete a further survey on their general impressions of unbundled legal services. (No fees were asked of or provided by roster lawyers in exchange for the promotional value of being listed on the project website or for the clients referred to them through the project or its website. Roster lawyers were only asked to complete the lawyers' surveys and to encourage their clients to complete the clients' survey once their services to each client had concluded.) Collection of data from these surveys began in April 2017 and ended in June 2018.

Efforts to educate the bench, bar, court workers and legal clinic staff continued throughout the first half of the project period. The project website was continually updated as lawyers joined the roster, contact information for roster lawyers changed and new resources were developed.

By the conclusion of the project period, the project offered a roster of 60 lawyers, practicing in almost every area of law; see Table 1.1 below. The most common area of law served was family law (n=50), followed by wills and estates (n=26) and civil litigation (n=26). Roster lawyers provided services from practices located in Airdrie, Brooks, Calgary, Edmonton, Lethbridge, Medicine Hat, Peace River, Red Deer, Sherwood Park, St. Albert and Sylvan Lake, and 16 roster lawyers also provided services online and by telephone; see Table 1.2. Most roster lawyers practiced in Calgary (n=22) or in Edmonton (n=17).

Table 1.1
Areas of Law Served by Lawyers on
the Roster of the Alberta Limited Legal Services Project

Area of Law	n
Family law	50
Wills and estates	26

Area of Law	n
Civil litigation	26
Legal research, legal opinions	16
Real property law	14
Small claims	13
Child protection	11
Corporate / commercial law	11
Adoption	10
Adult guardianship and trusteeship	10
Estate planning	10
Contract law	9
Business law	7
Commercial leases	7
Debtor and creditor law	7
Residential tenancies	7
Shareholder disputes	7
Insolvency, bankruptcy and foreclosure law	6
Directors' liability	6
Child specialist	4
Employment law	4
Personal injury law	4
Trusts	4
Administrative law	3
Criminal law	3
Construction law	2
Immigration and refugee law	2
Insurance law	2
Human rights	1
Municipal law	1

Table 1.2
Practice Locations of Lawyers on
the Roster of the Alberta Limited Legal Services Project

Location	n
Calgary	22
Edmonton	17
Sylvan Lake	5
Lethbridge	5
Brooks	2

Location	n
Red Deer	2
Medicine Hat	2
St. Albert	2
Airdrie	1
Sherwood Park	1
Peace River	1
Services provided online or by telephone	16

Although the Limited Scope Retainer Assessment Project concludes with this report, the project website, including the roster of participating lawyers and resources developed for roster lawyers, continues to be maintained at www.albertalegalservices.com, and will remain accessible until such time as the prepaid hosting services expire or the website is transferred to another group.

1.2 Methodology

The Alberta Limited Legal Services Project was advertised through the print, radio and television media, social media, roster lawyers and word of mouth, by both the Institute and members of the Canadian Bar Association Alberta's Limited Scope Retainers Working Group.

The data for this project were collected through three electronic surveys, the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey*, hosted on SurveyMonkey between April 2017 and June 2018. The client survey was advertised on the project website and by the Institute and roster lawyers, who were provided with business-card sized reminder slips to give to clients at the end of each file. Clients who completed the survey were offered the opportunity to enter a monthly draw for a modest prize. The two lawyer surveys were advertised on the project website and by the Institute through periodic newsletters distributed to roster lawyers by email.

The data were exported from SurveyMonkey to IBM's SPSS Statistics software package, a statistical analysis program, at the conclusion of the data collection periods, cleaned by Institute staff and analyzed.

1.2.1 Survey development and ethical considerations

The Institute developed three surveys to evaluate lawyers' and clients' satisfaction with unbundled legal services, the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey*, reproduced as Appendix F. None of the surveys limited respondents to commenting on legal services received or provided through the Alberta Limited Legal Services Project; respondents could provide their views on any unbundled legal services they had received or provided during the data collection period.

This project underwent an internal ethics review prior to initiating the surveys. We considered the primary ethical considerations for this project to be the anonymity of participants and the confidentiality of their responses, the vulnerability of participants, ensuring that participants' consent to participate in the study was informed and voluntary, and ensuring that lawyers could not be linked to clients, nor clients to lawyers. The introduction to the clients' survey stated:

Your lawyer will not be told whether you have completed this survey or about your responses. Your participation in this study will have no effect on any future services you may receive.

while the introduction to the lawyers' surveys stated:

... you will not be identified as the client's lawyer; your responses and your client's responses will never be linked.

The surveys were conducted on an anonymous basis; no identifying information was requested, unless client participants chose to provide their name and email address to enter the prize draw, and IP addresses were not tracked. Data were analyzed, both quantitatively and qualitatively, and have only been reported in aggregate form. The contact information of clients choosing to enter the draw was removed from the data set after the draw and dissociated from their responses.

In order to ensure that respondents' participation was informed and voluntary, the introductions to the surveys included a statement informing respondents of the purpose of the survey, explaining how their responses, if any, would be used, and explaining the steps taken by the Institute to ensure the confidentiality of their identities and responses.

1.2.2 Participant recruitment

The client survey was advertised by the Institute, through the project website and by roster lawyers, who were provided with reminder cards to give to clients at the end of each file. The lawyer surveys were advertised by the Institute to roster lawyers through periodic newsletters and the project website. Links to the surveys were provided on the project website and through social media accounts operated by Institute staff members.

In order to maximize participation, clients were offered the opportunity, at the end of the survey, to enter a draw for a \$100 prepaid Visa gift card; the Institute has successfully used this means of incentivization to encourage participation in other research. The draw was conducted at the end of each month, using SPSS Statistics to randomly select a respondent from among those clients electing to enter the draw, and the gift cards were mailed to the winners.

1.2.3 Data collection

The data collection period for the *Limited Legal Service Project Clients' Case Survey* ran from 18 April 2017 to 30 June 2018. A total of 56 individuals started this survey. Of these responses, 15 were deleted as the individuals failed to provide any data beyond answers to the demographic questions, resulting in 41 valid surveys that are analyzed in this paper.

The data collection period for the *Limited Legal Service Project Lawyers' Case Survey* ran from 18 April 2017 to 8 May 2018. A total of 63 surveys were started by 33 individual lawyers. Of these surveys, three were deleted as the respondents failed to provide any data beyond basic demographic information, resulting in 60 valid surveys that are analyzed in this paper.

The data collection period for the *Limited Legal Service Project Lawyers' Retrospective Survey* ran from 15 January 2018 to 30 June 2018. A total of 42 individuals started this survey. Of these responses, two were deleted as the individuals failed to provide any data beyond answers to the demographic questions, resulting in 40 valid surveys that are analyzed in this paper.

As a result of the methods used to recruit participants, the total number of individuals receiving notice of the surveys is unknown and the response rates accordingly cannot be calculated.

1.2.4 Analysis

The data obtained from the surveys were exported from SurveyMonkey at the end of the data collection period, cleaned to remove incomplete responses, and analyzed using SPSS Statistics. All identifying information was removed from the data to ensure the anonymity of respondents and the confidentiality of their responses.

1.3 Limitations

The lawyers and clients completing the surveys do not necessarily represent a random sample of lawyers providing unbundled legal services, or clients receiving such services, in Alberta. Caution should be exercised in generalizing the findings in this report to all lawyers providing unbundled legal services, or to all clients receiving them, in Alberta or in Canada.

1.4 Organization of report

Chapter 2 of this report presents the result from three surveys conducted to evaluate lawyers' and clients' satisfaction with unbundled legal services, the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey*. Chapter 3 provides an analysis and discussion of the findings from these surveys and makes a number of recommendations about unbundled legal services in Canada.

The appendices to this report reproduce some but not all of the materials developed by the Institute and the members of the Canadian Bar Association Alberta's Limited Scope Retainers Working Group.³ The project website continues to be maintained at www.albertalegalservices.com and includes the current list of roster lawyers, the resources developed for clients and the resources and other materials developed for roster lawyers. The website will remain accessible until such time as the prepaid hosting services expire or it is transferred to another group.

³ All of the materials developed for the Alberta Limited Legal Services Project are available from the author to any organization wishing to replicate any portion of this project at no cost.

2.0 SURVEY FINDINGS

This chapter presents the result from three surveys conducted to evaluate lawyers' and clients' satisfaction with unbundled legal services, the *Limited Legal Service Project Clients' Case Survey*, the *Limited Legal Service Project Lawyers' Case Survey*, and the *Limited Legal Service Project Lawyers' Retrospective Survey*. The first two surveys sought demographic information from respondents and asked questions about their experiences with and opinion of unbundled legal services provided in respect of specific cases. The third survey also collected demographic data and asked lawyer respondents a number of more expansive questions about their overall views on unbundled legal services, the impact of those services on their business and the impact of those services on their clients' ability to access justice and resolve their disputes.

None of the surveys limited respondents to commenting on legal services received or provided through the Alberta Limited Legal Services Project; respondents could provide their views on any unbundled legal services they had received or provided.

2.1 Demographic information

Respondents to all three surveys were asked a number of questions about their gender identity and age. Clients were additionally asked questions about their place of residence in Alberta, annual income and highest level of educational attainment.

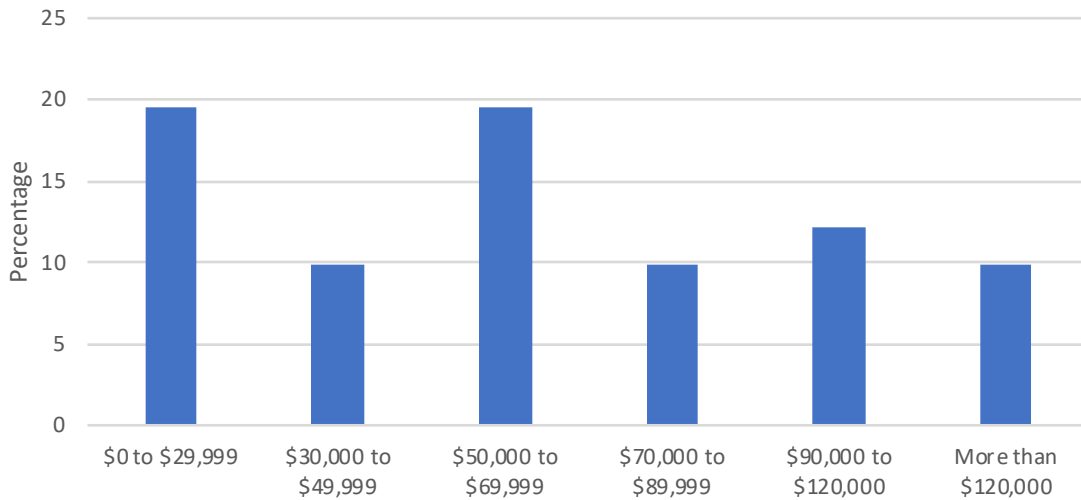
2.1.1 Client respondents

Almost three-fifths of individuals completing the *Limited Legal Service Project Clients' Case Survey* identified as female (58.5%) while almost two-fifths identified as male (39%). Most clients were between 35 and 44 years of age (29.3%), followed by clients between ages 55 and 64 (22%), and clients aged 25 to 34 and aged 65 to 74 (17.1% respectively). Almost half of clients (48.8%) lived in Alberta's two largest cities, Edmonton and Calgary, followed by clients living in Lethbridge or Red Deer (9.8%) and Okotoks and Brooks (9.8%). More than a quarter of clients lived elsewhere in Alberta (26.8%).

Most clients had incomes of \$50,000 to \$69,999 per year (19.5%), followed by clients with annual incomes of \$15,000 to \$29,999 (17.1%) and clients with annual incomes of \$90,000

to \$120,000 per year (12.2%), although eight clients, making up 19.5% of all client respondents, declined to state their income level; see Figure 2.1.

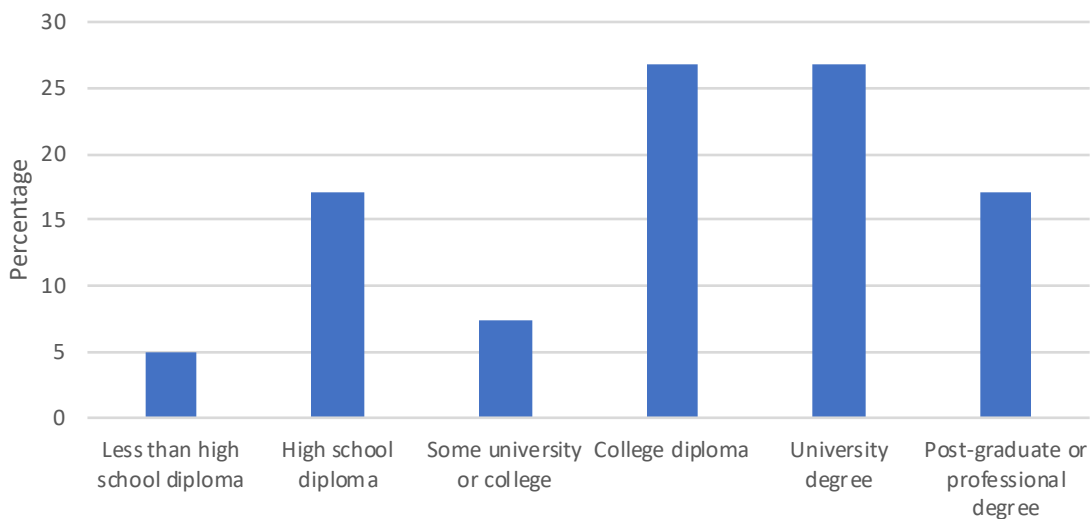
Figure 2.1
Annual Income of Client Respondents



N=41; Missing cases=8

More than half of clients had attained a college diploma or university degree (53.6%), while 17.1% reported that their highest level of education was a high school diploma and only 4.9% of clients reported attaining less than a high school diploma; see Figure 2.2.

Figure 2.2
Educational Attainment of Client Respondents



N=41; Missing cases=2

2.1.2 Lawyer respondents

Three-fifths of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* identified as female (60.6%), while the rest identified as male. A similar distribution prevailed among lawyers answering the *Limited Legal Service Project Lawyers' Retrospective Survey*, with 57.5% of lawyers identifying as female and two-fifths of lawyers identifying as male.

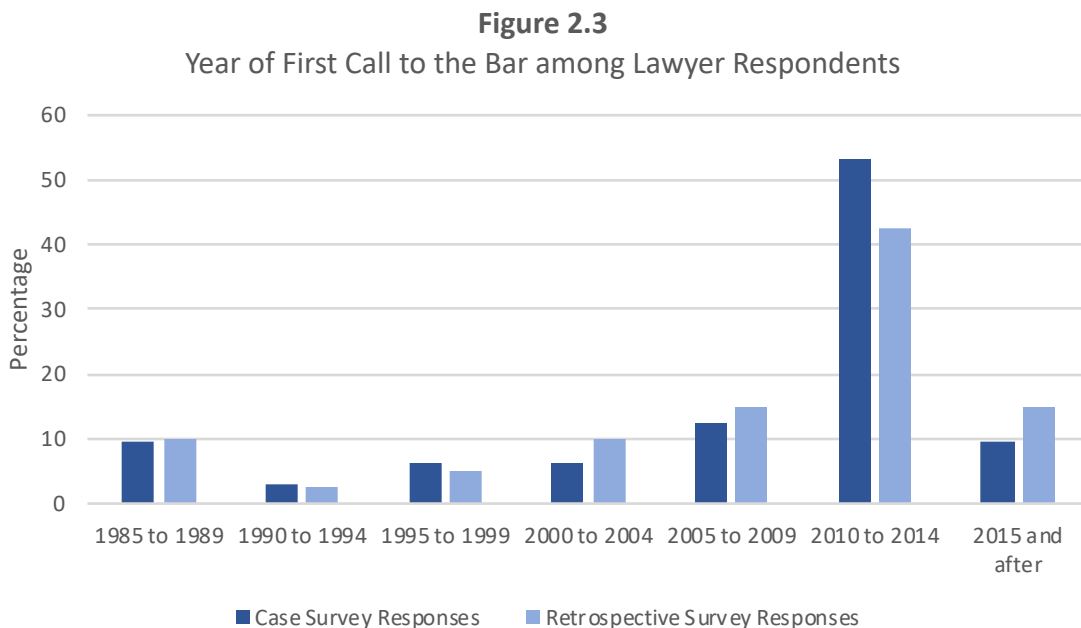
Almost half of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* were less than 34 years old (48.5%), followed by lawyers aged 35 to 44 (24.2%), lawyers aged 45 to 54 (18.2%) and lawyers aged 55 to 64 (9.1%). Lawyers completing the retrospective survey tended to be somewhat older. More than two-fifths of lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* were less than 34 years old (45%), followed by lawyers aged 45 to 54 (22.5%), lawyers aged 55 to 64 (17.5%) and lawyers aged 35 to 44 (15%).

2.2 Lawyers' practice information

The majority of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that the primary location of their practice is the Calgary area or the Edmonton area (66.7%), while almost one-fifth (18.2%) said that their practice is located in Lethbridge or the Red Deer area; 12.1% of lawyers said that their practice is located elsewhere in Alberta and one lawyer said that he or she primarily practiced over the telephone or online. Half of the lawyers completing the retrospective survey said that their practice is located in the Calgary area, while 20% said that their practice is located in the Edmonton area and a further 20% said that their practice is in Lethbridge or the Red Deer area. Less than one-tenth of lawyers said that their practice is located elsewhere in Alberta (7.5%), and one lawyer said that he or she primarily practiced over the telephone or online.

The majority of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that they were called to the bar between 2010 and 2014 (53.2%), while 9.4% of lawyers were called more recently and 37.4% of lawyers were called before 2010; see Figure 2.3. No lawyers answering this survey said that they had been called to the bar earlier than 1985, and none had been called after 2016. Lawyers answering the *Limited Legal Service Project Lawyers' Retrospective Survey* tended to be called to the bar for a somewhat longer period of time. More than two-fifths of these respondents said that they were called to the bar between 2010 and 2014 (42.5%), while a further 42.5% of lawyers were called before 2010 and only 15% were called in 2015 or more recently. No

lawyers answering this survey said that they had been called to the bar earlier than 1985, and none had been called after 2017.



Case Survey:
N=33; Missing cases=1
Retrospective Survey:
N=40; Missing cases=0

The majority of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that they provide legal services in two to three areas of the law (51.5%), while the remainder practiced in one area (21.2%), in four to six areas (18.2%) and in seven or more areas of the law (9.1%). Lawyers completing the *Legal Service Project Lawyers' Retrospective Survey* were asked about the areas of law they practiced in more detail. Fewer than five respondents practiced in each of the areas of: administrative law; construction law; entertainment law; human rights; the law on insolvency, bankruptcy and foreclosures; personal injury; real property law; and, residential tenancies. The most common areas of law practiced by five or more respondents were family law (n=34), civil litigation (n=21) and wills and estates (n=19); see Table 2.1.

Table 2.1
Areas of Law Practiced by Five or More Lawyer Respondents

Area of Law	n
Adoption	5
Adult guardianship and trusteeship	10
Business law, commercial leases	5

Area of Law	n
Child protection	5
Civil litigation	21
Corporate/commercial law, shareholders disputes, directors' liability	8
Criminal law	6
Debtor/creditor law	10
Employment law	5
Estate planning, trusts, wills and estates	19
Family law, divorce law	34
Immigration and refugee law	5
Legal research and writing, legal opinion	6
Small claims	13

Multiple response data
N=40

Lawyers completing the *Legal Service Project Lawyers' Retrospective Survey* were also asked about the legal services they provide as a part of their ordinary service offerings and as an unbundled legal service. Respondents provided fewer drafting services, document review services, agent services (filing documents and entering orders in court), consultation services, legal research and writing services and representation services as a part of their unbundled service offerings than they provided in their regular practice. The only service respondents were more likely to provide on an unbundled basis than as a part of their ordinary practice were coaching services; see Table 2.2.

Table 2.2
Services Provided by Lawyer Respondents as Part of Their
Ordinary Service and Unbundled Service Offerings

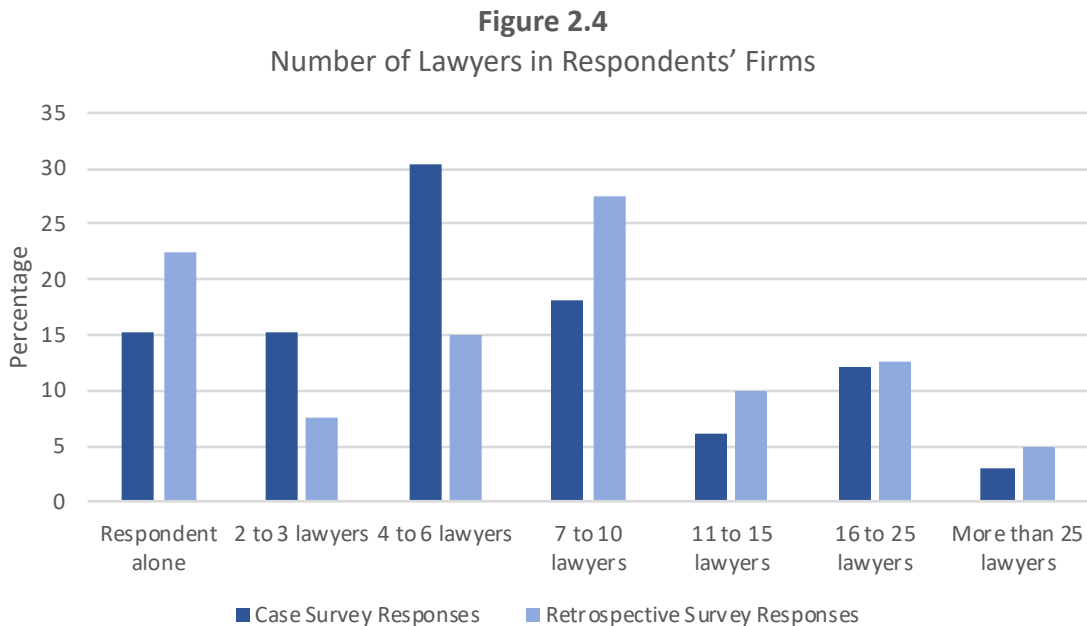
Legal service	Ordinary n	Unbundled n
Coaching services		
Filing and service processes	20	32
Disclosure and discovery processes	26	28
Questioning processes	27	24
Trial processes	26	30
Appeal processes	5	7
Negotiation, mediation or arbitration processes	25	27
Document drafting services		
Demand letters	34	31
Pleadings and other trial court documents	36	36

Legal service	Ordinary n	Unbundled n
Orders	38	32
Appeal documents	19	13
Agreements and settlement documents	37	35
Wills, powers of attorney, personal directives	28	18
Document review services		
Demand letters	34	31
Pleadings and other trial court documents	35	34
Financial disclosure	33	31
Orders	36	32
Agreements and settlement documents	34	32
Court agent services		
Filing pleadings and other trial court documents	37	25
Entering orders	35	23
Consultation services		
Initial consultation	38	36
Follow-up consultations	35	31
Independent legal advice on agreements	34	33
Calculation of child support or spousal support	32	30
Calculation of income	31	28
Calculation of property division	32	31
Research and writing services		
Legal research	33	31
Legal opinions	34	30
Representation services		
Appearing before Provincial Court, applications	30	22
Appearing before Provincial Court, trials	30	17
Appearing before Provincial Court, other purpose	29	20
Appearing before Court of Queen's Bench, applications	35	29
Appearing before Court of Queen's Bench, trials	29	15
Appearing before Court of Queen's Bench, other purpose	33	24
Appearing before Court of Appeal	17	7
Appearing before tribunals	13	4
Appearing at questionings	34	22
Appearing for negotiation, mediation or arbitration	33	24
Conducting negotiations	34	22
Conducting mediation	24	20
Conducting arbitration	14	11
Enforcing judgments	27	21

Legal service	Ordinary n	Unbundled n
Enforcing agreements	28	18

Multiple response data
N=40

Most lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* practiced in a firm composed of four to six lawyers (30.3%) or a firm of seven to ten lawyers (18.2%); see Figure 2.4. Almost one-third of lawyers either practiced on their own or in a firm of two to three lawyers (15.2% respectively) and one-fifth of lawyers worked in firms of 11 lawyers or more (21.2%). However, most lawyers completing the *Legal Service Project Lawyers' Retrospective Survey* practiced in a firm composed of seven to ten lawyers (27.5%) or worked as a sole practitioner (22.5%).



Case Survey:
N=33; Missing cases=0
Retrospective Survey:
N=40; Missing cases=0

2.3 Clients' experiences of the unbundled legal services they received

Almost two-thirds of the individuals completing the *Limited Legal Service Project Clients' Case Survey* said that the legal services they received were provided by a lawyer on the roster of the Alberta Limited Legal Services Project (63.4%). A further 22% of clients

were not sure whether their lawyer was a member of the roster. Most clients indicated that they found out about the Alberta Limited Legal Services Project from the project website (29.3%), while others said that they found out about the project from the lawyer they hired (17.1%), from reporting in the media (12.2%), from a legal clinic (9.8%), from a friend or relative (12.2%) or from another sources (19.5%).

Almost three-fifths of clients said that their lawyer asked them to sign a letter or an agreement describing the services the lawyer would provide (59.4%), while a quarter of clients said that the lawyer did not ask them to sign such a document and a further 15.6% did not know whether the lawyer had asked them to sign such a document. The vast majority of clients, however, said that they *very clearly* or *clearly* understood the work the lawyer was going to provide (87.1%). Only 12.9% of clients said that their understanding of the lawyer’s services was *neither clear nor unclear*, and no clients said that their understanding was unclear. Less than a tenth of clients said that they asked the lawyer to do more work or different work than the lawyer initially agreed to provide (9.4%), however none of those clients were asked to sign a new letter or agreement describing the lawyer’s new services.

Most clients reported receiving unbundled legal services from their lawyer because they asked for such services (72.2%), while a 27.8% of clients received unbundled services at the suggestion of their lawyer.

2.3.1 Nature of and satisfaction with services received

Most clients reported receiving services in the areas of family law (n=20) and the law on wills and estates (n=10); see Table 2.3. Less than five clients received services in the areas of: adult guardianship and trusteeship; business law and commercial leases; corporate / commercial law, debtor and creditor law; shareholders’ disputes and directors’ liability; criminal law; employment law; human rights; legal research and writing and legal opinions; malpractice law; small claims issues; and, real property law. No clients received services in the areas of: adoption; immigration and refugee law; the law on insolvency, bankruptcy and foreclosures; personal injury; or, residential tenancy law.

Table 2.3
Areas of Law in which Services Were Provided to Five or More Clients

Area of Law	n
Child protection	5

Area of Law	n
Civil litigation	6
Estate planning, trusts, wills and estates	10
Family law, divorce law	20

Multiple response data
N=41

Most clients reported receiving unbundled services in the form of initial consultations (n=28), legal opinions (n=13), coaching on filing and service processes (n=10) and the drafting of agreements and settlement documents (n=9); see Table 2.4. No clients reported receiving coaching in trial processes, representation at questionings, representation before the Court of Appeal and representation before a tribunal.

Table 2.4
Services Provided by Lawyer Respondents as Part of
Their Unbundled Service Offerings

Legal service	n
Coaching services	
Filing and service processes	10
Disclosure and discovery processes	2
Questioning processes	1
Trial processes	0
Appeal processes	1
Negotiation, mediation or arbitration processes	4
Document drafting services	
Demand letters	2
Pleadings and other trial court documents	1
Orders	4
Appeal documents	1
Agreements and settlement documents	9
Wills, powers of attorney, personal directives	7
Document review services	
Demand letters	1
Pleadings and other trial court documents	6
Financial disclosure	1
Orders	5
Agreements and settlement documents	8
Court agent services	
Filing pleadings and other trial court documents	5
Entering orders	6

Legal service	n
Consultation services	
Initial consultation	28
Follow-up consultations	8
Independent legal advice on agreements	2
Calculation of child support or spousal support	3
Calculation of income	2
Calculation of property division	5
Research and writing services	
Legal research	1
Legal opinions	13
Representation services	
Appearing before Provincial Court	3
Appearing before Court of Queen's Bench	1
Appearing before Court of Appeal	0
Appearing before tribunals	0
Appearing at questionings	0
Appearing for negotiation, mediation or arbitration	4
Conducting negotiations	4
Conducting mediation	2
Conducting arbitration	1
Enforcing judgments	1
Enforcing agreements	5

Multiple response data

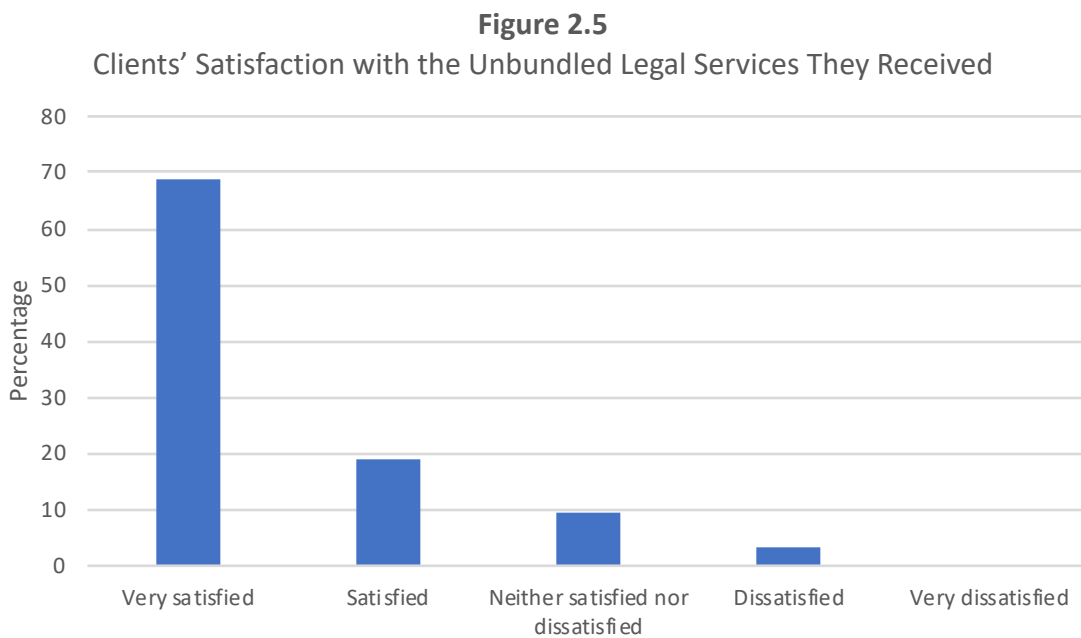
N=41

For almost half of clients, the legal services provided were completed in one day or the same day (45.2%). Services were completed in two to five days for 12.9% of clients, and in six to ten days for 16.1% of clients. Slightly less than a sixth of clients said that the services they received were completed in 11 to 35 days (16.2%), while 9.7% of clients said that it took 36 or more days for services to be completed. However, a large majority of clients said that services were completed either when the client expected (87.5%) or sooner than the client expected (9.4%); only 3.1% of clients said that their lawyer was slower than expected.

Clients were asked whether they could have done the work they hired the lawyer to perform. Most clients said that they *could not* or *probably could not* have done the work themselves (48.4%), while smaller numbers of clients said that:

- a) they could have done the work themselves, *but it would have taken them longer* (12.9%);
- b) they could have done the work themselves, *but without as good a result* (19.4%); and,
- c) they could have done the work themselves, *just as quickly and with just as good a result* (9.7%).

Nevertheless, the vast majority of clients were *very satisfied* or *satisfied* with the services the lawyer provided (87.6%); see Figure 2.5. Less than a tenth of clients said that they were *neither satisfied nor dissatisfied* (9.4%) with the services provided, only 3.1% said that they were *dissatisfied*, and no clients said that they were *very dissatisfied*.



N=41; Missing cases=9

Clients were also asked *Was there anything the lawyer could have done to improve your satisfaction with the work the lawyer performed for you?* Half of the 12 comments received were uncritical of the services clients received and the lawyers providing them, and expressed clients' satisfaction with the lawyers retained, including the following:

No, [the lawyer] was excellent, would recommend him for sure and will use him again if the need arises.

I was satisfied with the work that was done.

No, the lawyer was very helpful and friendly.

She did the work agreed upon. If she still went to court I would have hired her to attend court for me as well.

One comment was neither positive nor negative; the remaining comments expressed concerns about the adequacy and completeness of the work performed:

Final court order was not specific enough for the opposing party. Thus too many loop holes.

He did not tell me that my pleadings were not appropriate. I found this out from the Judge and then he asked for money to do this. ... This caused me additional legal problems.

It may have been my expectations, but I felt that the paper work I received was less inclusive than the paper work in the packages you can buy for about \$75 ...

Listen more.

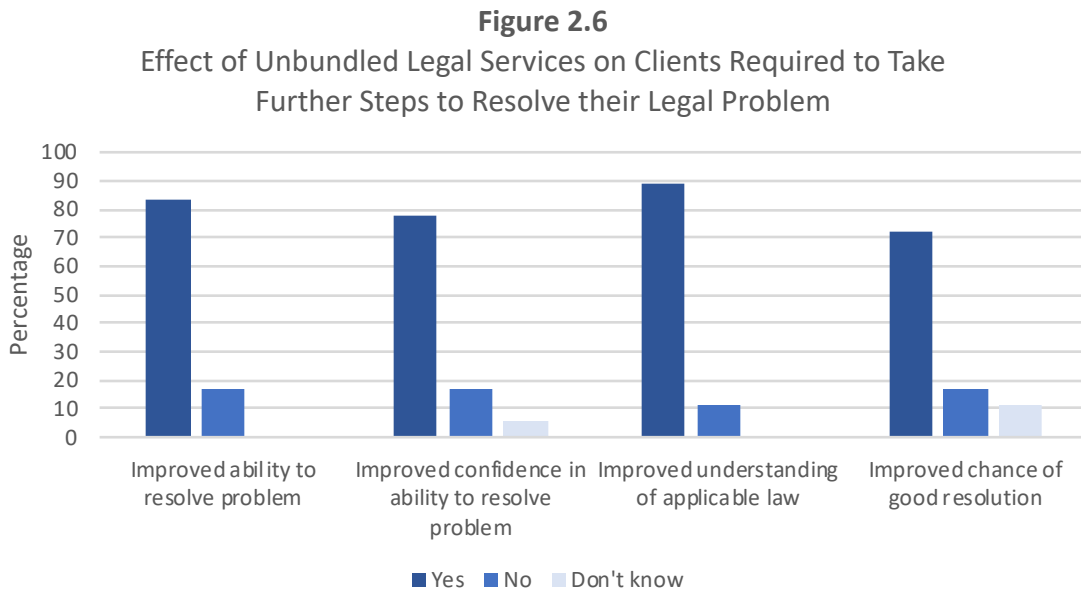
Provide a follow-up review of the completed documents as a part of the fixed cost would have been nice.

2.3.2 Effect of services received

Two-fifths of clients reported that the services they received resolved their legal problem (40.6%), and half reported that further steps were required to resolve their problem; almost one tenth of clients (9.4%) said that they did not know whether the services received resolved their problem. However, as shown in Figure 2.6, of the clients in the latter two groups:

- a) more than four-fifths said that the services they received improved their *ability to resolve their legal problem* (83.3%);
- b) more than three-quarters said that the services improved their *confidence in their ability to resolve their legal problem* (77.8%);
- c) almost nine-tenths said that the services improved their *understanding of the law that applies to their legal problem* (88.9%); and,

- d) almost three-quarters said that the services improved *the chances that they will obtain a good resolution to their legal problem* (72.2%).



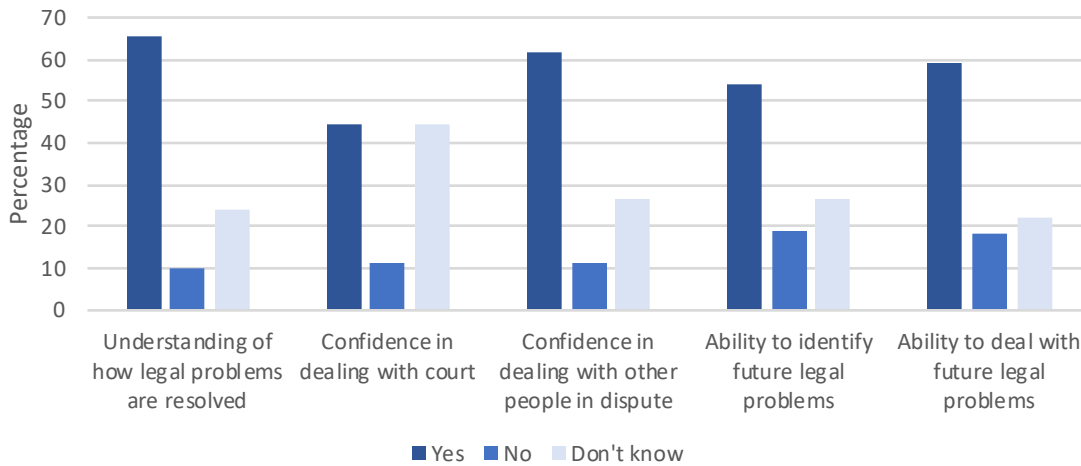
n=19; Missing cases=1

Clients were also asked about the impact of the services they received on their comfort with and understanding of the legal system in general, in order to gauge the impact of unbundled legal services on clients' ability to access justice:

- a) almost two-thirds of clients said that the services they received improved their *understanding of how legal problems are resolved* (65.5%);
- b) more than two-fifths of clients said that the services they received improved their *confidence in dealing with court and court workers* (44.4%);
- c) more than three-fifths of clients said that the services they received improved their *confidence in dealing with other people involved in their legal problem, including the individuals on the other side of their problem* (61.5%);
- d) more than half of clients said that the services they received improved their *ability to identify other legal problems in the future* (53.8%); and,
- e) almost three-fifths of clients said that the services they received improved their *ability to deal with other legal problems in the future* (59.3%).

See Figure 2.7.

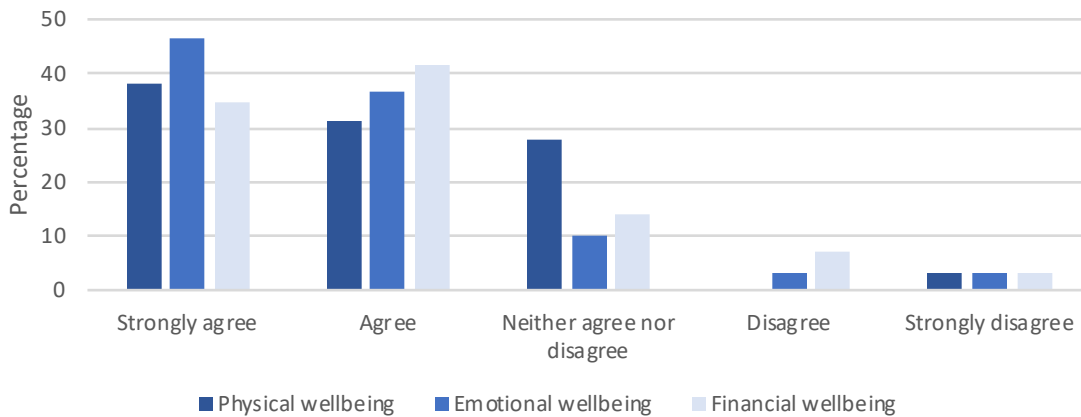
Figure 2.7
Effect of Unbundled Legal Services on Improving Clients' Comort with and Understanding of the Legal System



N=41; Missing cases=15

Clients were asked a number of additional questions relating to the impact of the unbundled legal services they received on their personal wellbeing. More than two-thirds of clients (68.9%) *strongly agreed* or *agreed* that the help they received from their lawyer had a positive impact on their physical wellbeing; almost half *strongly agreed* that the help they received had a positive impact on their emotional wellbeing (46.7%) and 36.7% *agreed* that it had this effect; and, slightly more than three-quarters *strongly agreed* or *agreed* that the help they received had a positive impact on their financial wellbeing (75.9%); see Figure 2.8.

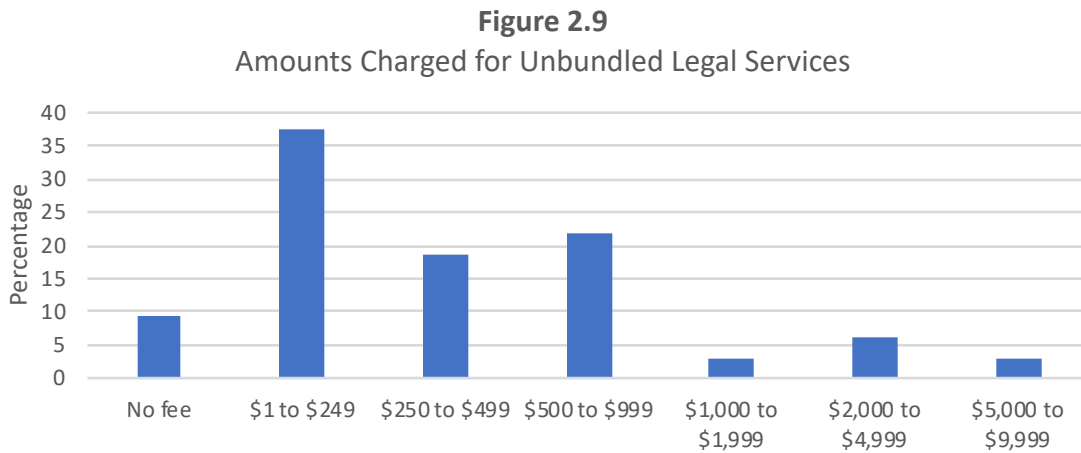
Figure 2.8
Clients' Agreement with Statements on the Effect of Receiving Unbundled Legal Services on Different Dimensions of their Wellbeing



N=41; Missing cases=12

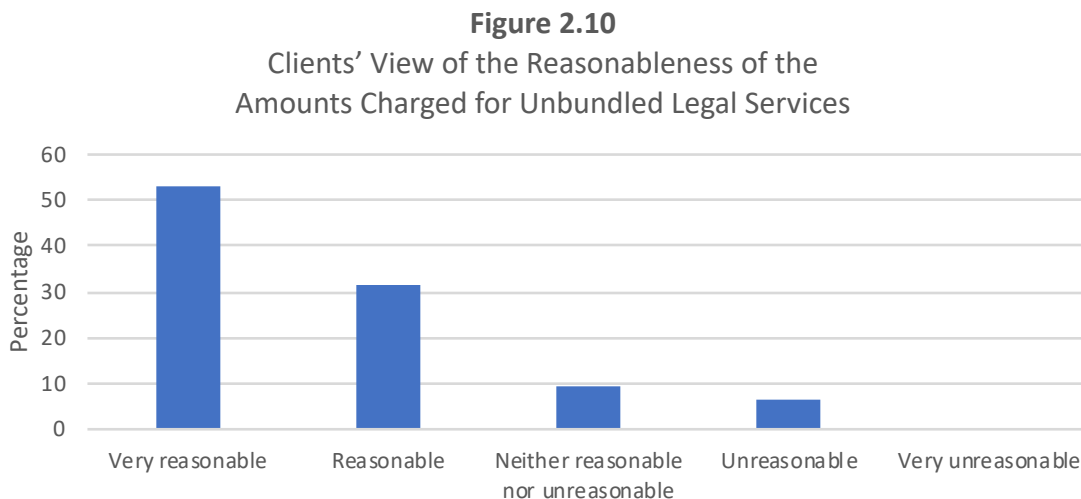
2.3.3 Cost of services received

Almost four-fifths of clients reported that the amount they were charged for unbundled legal services was less than \$1,000 (78.2%); see Figure 2.9. Less than one-tenth of clients said that their lawyer did not charge for services rendered (9.4%), while 12.5% of clients said that the amount charged was between \$1,000 and \$9,999. No clients said that they were charged \$10,000 or more.



N=41; Missing cases=9

Clients said that the lawyer most often charged by a flat rate (40.6%) or by the hour (34.4%); 15.6% said that they did not know how their lawyer calculated the amount charged. The vast majority of clients felt that the amount charged by the lawyer was *very reasonable* or *reasonable* (84.4%); see Figure 2.10. Only 9.4% of clients described the amount charged as *neither reasonable nor unreasonable*, and only 6.3% described the amount as *unreasonable*.



N=41; Missing cases=9

2.3.4 Attitudes toward unbundled legal services

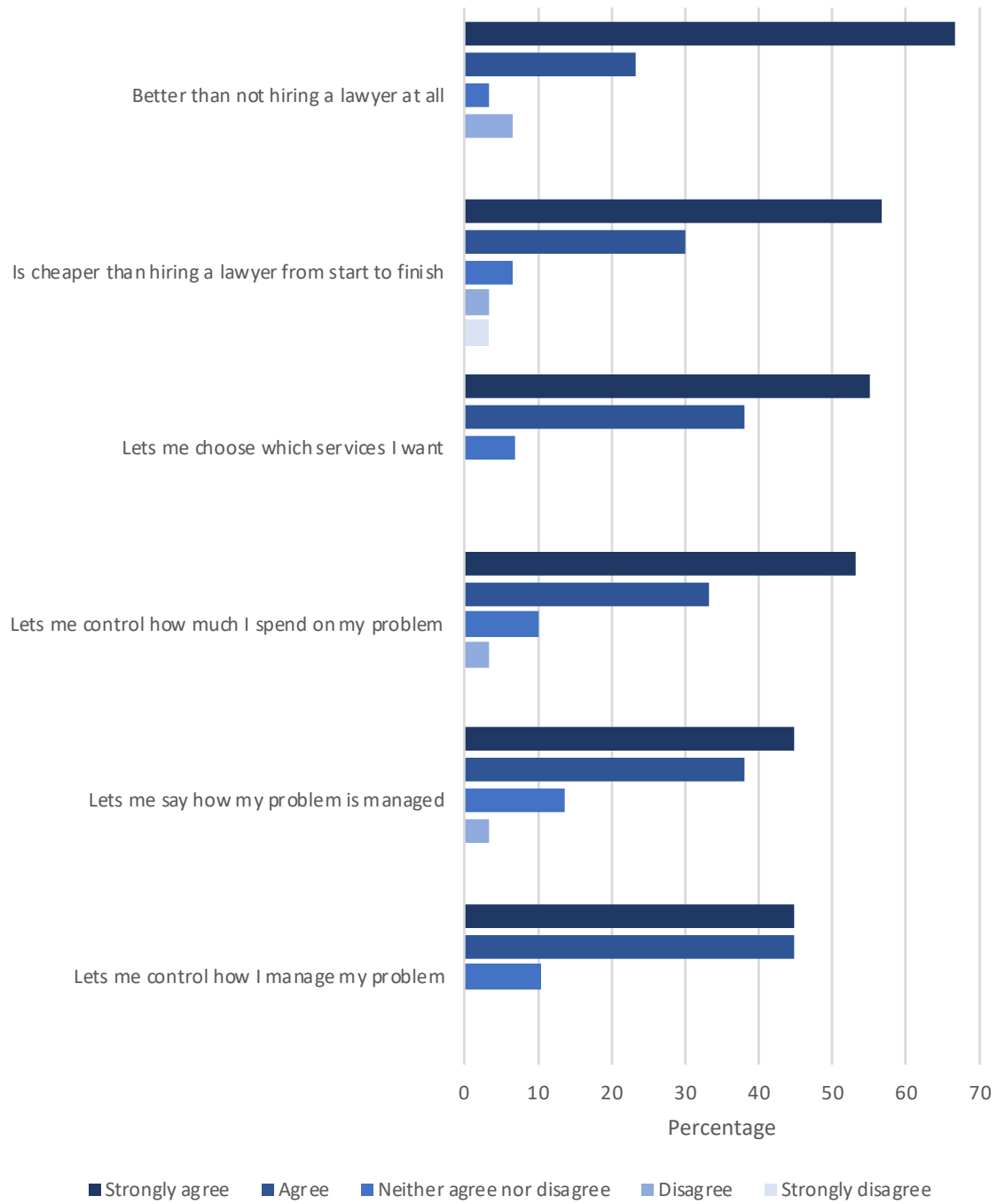
More than three-quarters of the individuals completing the *Limited Legal Service Project Clients' Case Survey* were content to have hired their lawyer to assist with just a part of their specific legal problem and said that they would not have preferred to hire the lawyer to handle all of their problem (76.7%). Almost all clients said that they would consider hiring a lawyer to provide unbundled legal services in the future (96.6%).

Clients were also asked about their agreement with a number of statements to assess their attitudes toward unbundled legal services in general:

- a) almost all clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services is better than not hiring a lawyer at all* (90%);
- b) more than four-fifths of clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services is cheaper than hiring a lawyer to handle a legal problem from start to finish* (86.7%);
- c) almost all clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services lets me choose which services I want the lawyer to perform* (93.1%);
- d) more than four-fifths of clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services lets me control how much I spend on my legal problem* (86.7%);
- e) more than four-fifths of clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services lets me say how my legal problem is managed* (82.8%); and,
- f) more than four-fifths of clients *strongly agreed* or *agreed* with the statement *Hiring a lawyer to provide limited legal services lets me control how I manage my legal problem* (89.7%).

No more than two clients said that they *disagreed* or *strongly disagreed* with any of these statements; see Figure 2.11.

Figure 2.11
 Clients' Agreement with Statements on
 Hiring a Lawyer to Provide Unbundled Legal Services



N=41; Missing cases=12

2.4 Lawyers' experience of the unbundled legal services they provided

Lawyers were asked to complete the *Limited Legal Service Project Lawyers' Case Survey* to gather data about their experiences with individual files. Participants in the Alberta Limited Legal Services Project were asked to complete the survey every time they finished a file in which they had provided legal services on an unbundled basis. The survey was designed to take no more than five minutes to complete, once respondents had become familiar with the questions, to minimize disruption to respondents' practices.

The survey gathered data about the nature of the unbundled services provided, the cost of those services to the client and lawyers' satisfaction with and opinion of the services they had provided. The *Limited Legal Service Project Lawyers' Retrospective Survey* was designed to capture lawyers' overall experience providing unbundled legal services.

2.4.1 Nature of client, file and services provided

Slightly more than one-third of respondents to the *Limited Legal Service Project Lawyers' Case Survey* said that the client came to them knowing about the Alberta Limited Legal Services Project (35%), almost one-half said that the client did not know about the project (48.3%) and 16.7% said that they did not know whether the client knew about the project. However, almost three-quarters of lawyers said that the client came to them seeking unbundled legal services (71.7%), while the remainder said that they suggested that the client's problem be handled on an unbundled basis (28.3%).

Respondents said that they primarily interacted with their clients at meetings at their offices (49.2%), online (30.5%) and by telephone (18.6%).

Most lawyers provided services in the areas of family law (n=46) and civil litigation (n=8). Less than five lawyers provided services in the areas of: administrative law; adoption; child protection; corporate/ commercial law; debtor and creditor law; legal research and writing and legal opinions; residential tenancy law; small claims; and, wills and estates. No lawyers provided services in the areas of: adult guardianship and trusteeship; business law and commercial leases; criminal law; employment law; human rights; immigration and refugee law; the law on insolvency, bankruptcy and foreclosures; and, personal injury.

The most common services provided, described in Table 2.5, were: initial consultations (n=46); drafting pleadings and other trial court documents (n=21); calculating child

support or spousal support (n=18); reviewing pleadings and other trial court documents (n=18); follow-up consultations (n=17); and, coaching for trial processes (n=12). No lawyers provided services involving: coaching for appeals; reviewing documents related to an appeal; reviewing demand letters; appearing in the Provincial Court, whether for applications, trials or other purposes; appearing in the Court of Queen’s Bench for trials; appearing before tribunals; appearing at a negotiation, mediation or arbitration; conducting a mediation; conducting an arbitration; enforcing judgments; and, enforcing agreements.

Table 2.5
Unbundled Legal Services Provided by Lawyers

Legal service	n
Coaching services	
Filing and service processes	10
Disclosure and discovery processes	6
Questioning processes	2
Trial processes	12
Negotiation, mediation or arbitration processes	9
Document drafting services	
Demand letters	4
Pleadings and other trial court documents	21
Orders	6
Appeal documents	2
Agreements and settlement documents	9
Wills, powers of attorney, personal directives	1
Document review services	
Pleadings and other trial court documents	18
Financial disclosure	5
Orders	5
Agreements and settlement documents	7
Court agent services	
Filing pleadings and other trial court documents	7
Entering orders	3
Consultation services	
Initial consultation	46
Follow-up consultations	17
Independent legal advice on agreements	7
Calculation of child support or spousal support	18
Calculation of income	4
Calculation of property division	7

Legal service	n
Research and writing services	
Legal research	3
Legal opinions	5
Representation services	
Appearing before Court of Queen’s Bench, applications	4
Appearing before Court of Queen’s Bench, other purpose	3
Appearing before Court of Appeal	1
Appearing at questionings	3
Conducting negotiations	6

Multiple response data

N=60

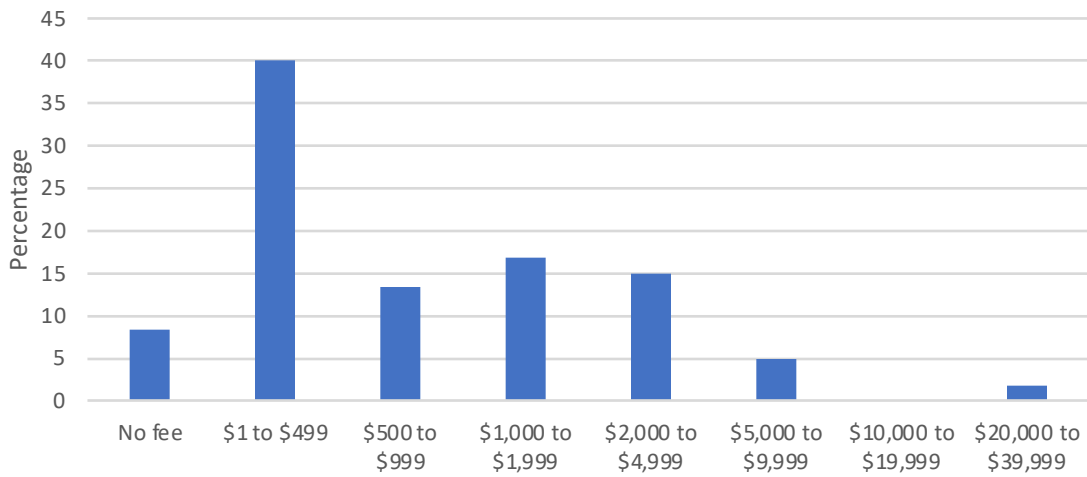
Most lawyers reported completing work for the client in less than five business days (45%), with almost one-fifth of files completing in one day (18.3%). Although more than a quarter of remaining files completed within 6 to 35 days (28.4%), a similar number required more than 35 days to complete (26.7%).

Less than one-third of lawyers said that the services they provided resolved the client’s legal problem (30%). Three-fifths of lawyers said that additional steps would be required to resolve the client’s problem, and one-tenth of lawyers said that they did not know whether their services resolved the client’s legal problem or not.

2.4.2 Cost of services provided

More than three-fifths of lawyers reported that the amount they charged in fees for unbundled legal services was less than \$1,000 (61.7%); see Figure 2.12. Less than one-tenth of lawyers said that they did not charge for their services (8.3%), while more than a third of lawyers said that the amount charged was between \$1,000 and \$9,999 (36.7%). Only one lawyer reported charging between \$20,000 and \$39,999 for their services, and no lawyers reported charging between \$10,000 and \$19,999 or \$40,000 or more for their services.

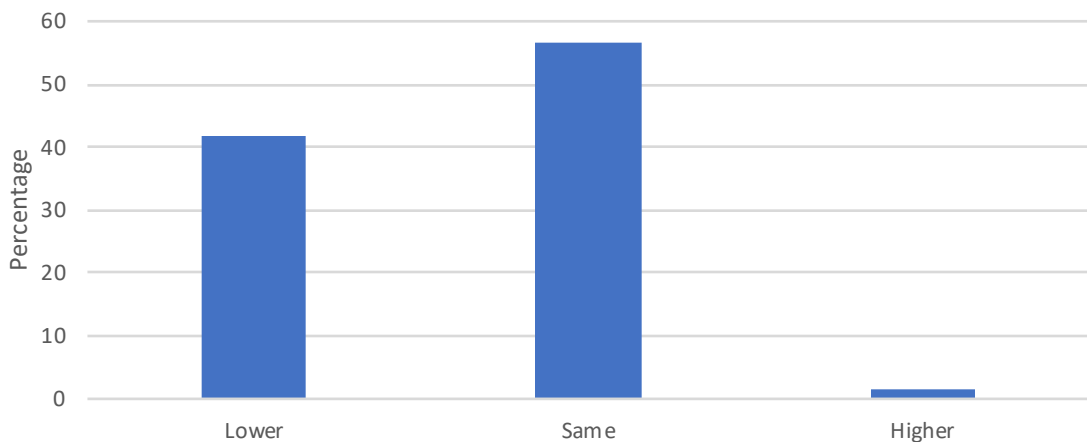
Figure 2.12
Amounts Charged for Unbundled Legal Services



N=60; Missing cases=0

Most lawyers billed for their fees at a flat rate (45%), while 38.3% of lawyers said that they billed the client for their time by the hour. More than half of lawyers said that the amount charged was the same as what they would normally charge for the work performed (56.7%), and most other lawyers said that the amount charged was lower (41.7%); see Figure 2.13.

Figure 2.13
Amount Charged by Lawyers in Unbundled Legal Service Files Compared to Amount Ordinarily Charged for those Services

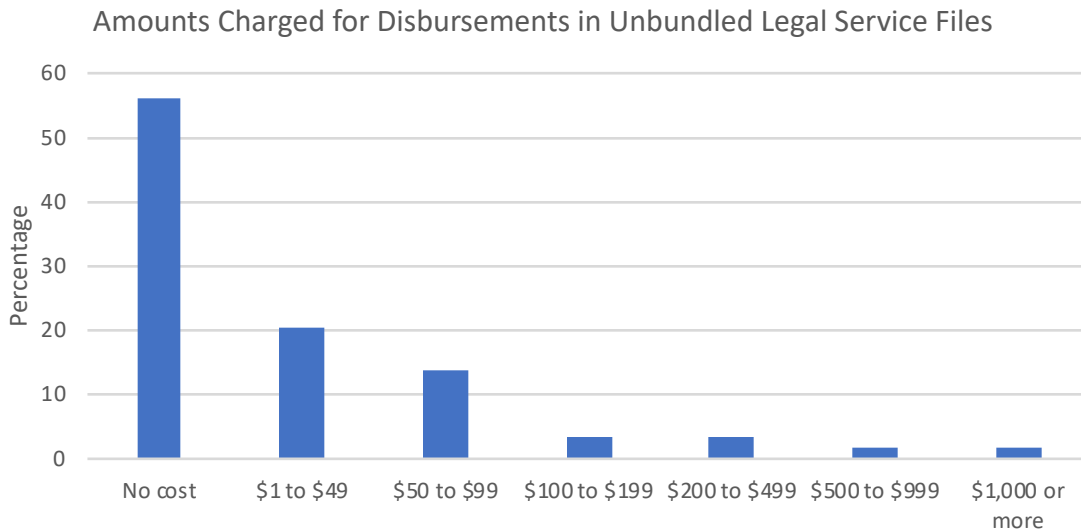


N=60; Missing cases=0

Almost all respondents reported charging nothing or less than \$100 for disbursements in their unbundled service files (89.8%); see Figure 2.14. Less than one-tenth of

respondents reported charging between \$100 and \$999 for disbursements (8.5%), and only one respondent reported charging \$1,000 or more for disbursements.

Figure 2.14

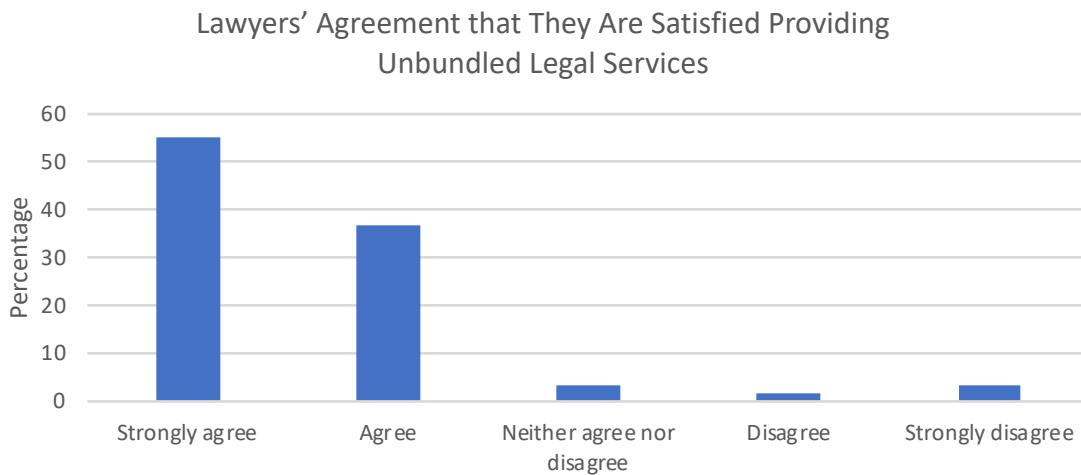


N=60; Missing cases=1

2.4.3 Attitudes toward unbundled legal services

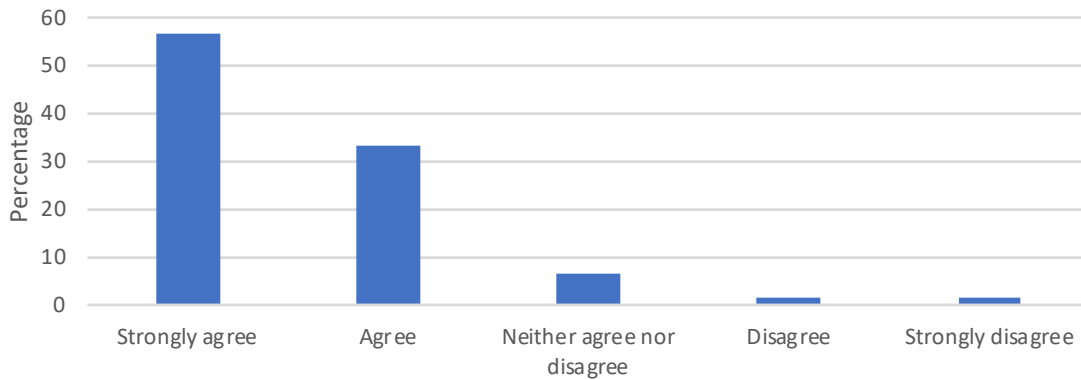
Almost all lawyers said that they were *strongly satisfied* or *satisfied* providing legal services on an unbundled basis (91.7%); only two lawyers *neither agreed nor disagreed* that they were satisfied providing unbundled legal services, and only three *disagreed* or *strongly disagreed* that they were satisfied; see Figure 2.15. Almost all lawyers *strongly agreed* or *agreed* that they would provide unbundled services to other clients (90%), while only two said that they would not; see Figure 2.16.

Figure 2.15



N=60; Missing cases=0

Figure 2.16
Lawyers' Agreement that They Will Offer
Unbundled Legal Services to Other Clients



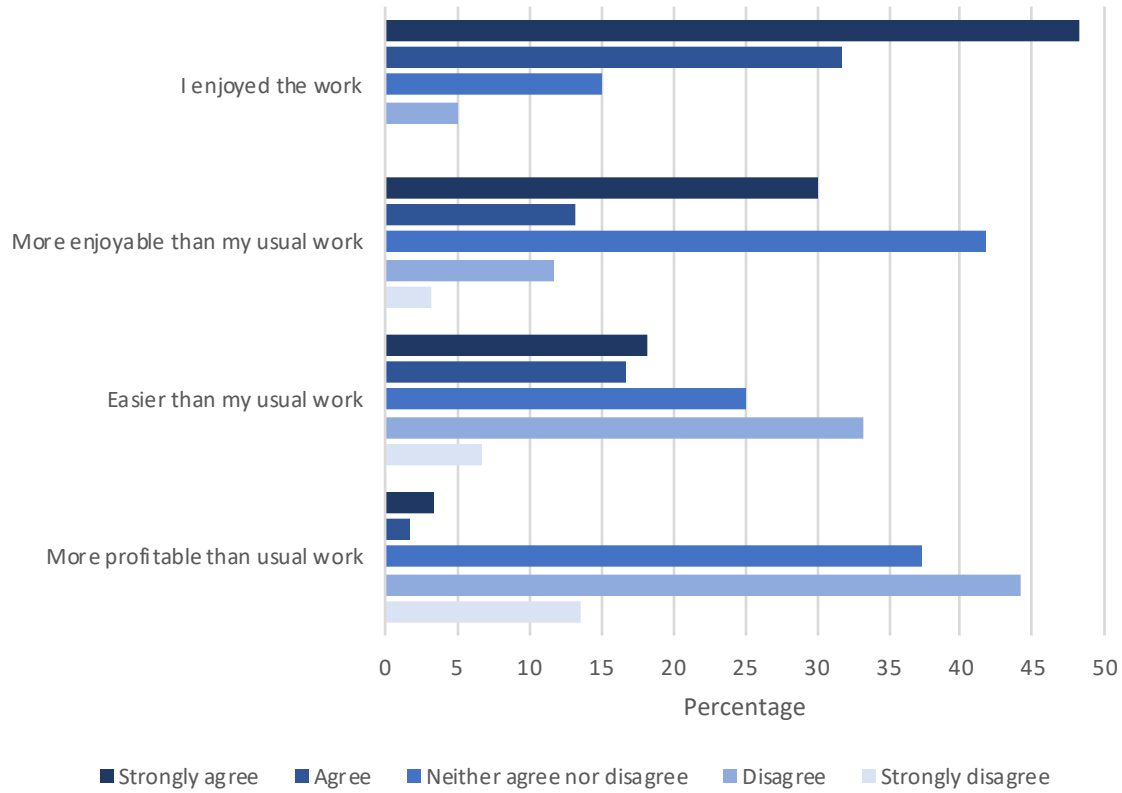
N=60; Missing cases=0

Lawyers were also asked about their agreement with a number of statements to assess their attitudes toward unbundled legal services in general, see Figure 2.17:

- a) four-fifths of lawyers *strongly agreed* or *agreed* with the statement *I enjoyed the work I performed for the client*;
- b) slightly more than two-fifths of lawyers *strongly agreed* or *agreed* with the statement *The work I performed for the client was more enjoyable than my usual work* (43.3%);
- c) slightly more than one-third of lawyers *strongly agreed* or *agreed* with the statement *The work I performed for the client was easier than my usual work* (35%), while two-fifths *disagreed* or *strongly disagreed*; and,
- d) only 5.1% of lawyers *strongly agreed* or *agreed* with the statement *The work I performed for the client was more profitable than my usual work*, while almost three-fifths *disagreed* or *strongly disagreed* (57.7%).

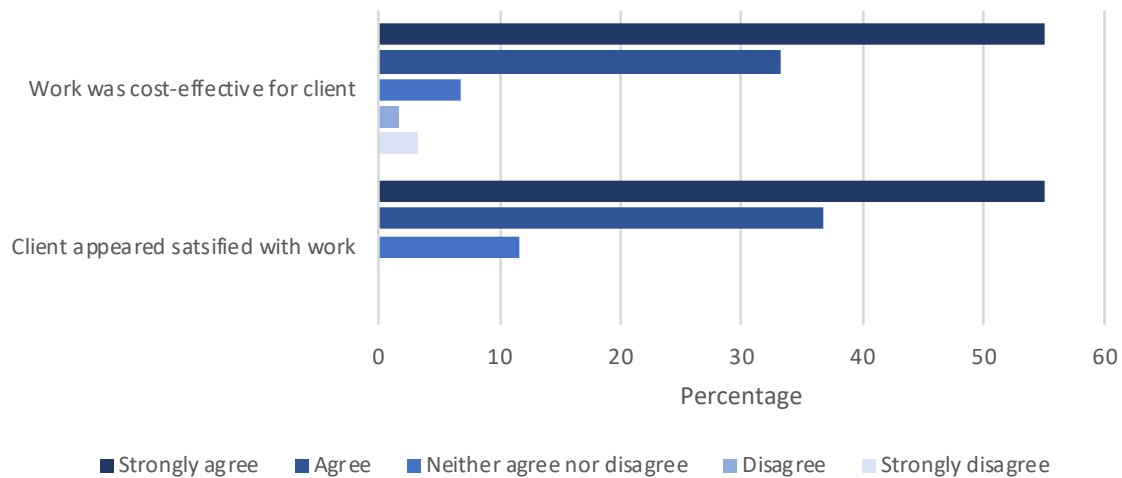
However, a strong majority of lawyers *strongly agreed* or *agreed* with the statements *The work I performed for the client was cost-effective for the client* (88.3%) and *The client appeared satisfied with the work I performed* (88.3%); see Figure 2.18.

Figure 2.17
Lawyers' Agreement with Statements on Providing Unbundled Legal Services Compared to Their Ordinary Work



N=60; Missing cases=1

Figure 2.18
Lawyers' Agreement with Statements on Benefits to Clients of Unbundled Legal Services Provided



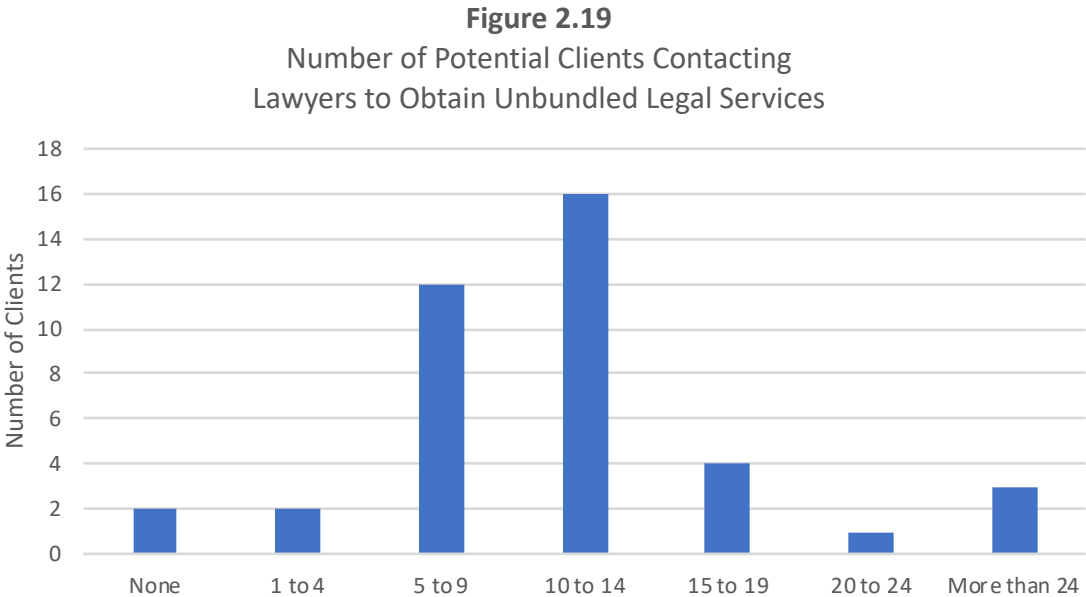
N=60; Missing cases=0

2.5 Lawyers' views on providing unbundled legal services and on the Alberta Limited Legal Services Project

The *Limited Legal Service Project Lawyers' Retrospective Survey* asked lawyers questions about: the unbundled legal services they provided since 1 April 2017, whether through the Alberta Limited Legal Services Project or not; their impressions of the project and the project website, their views of the effect of providing unbundled legal services on their clients, themselves and the justice system as a whole; and, their intentions to provide unbundled legal services in the future.

2.5.1 Unbundled legal services provided by lawyers

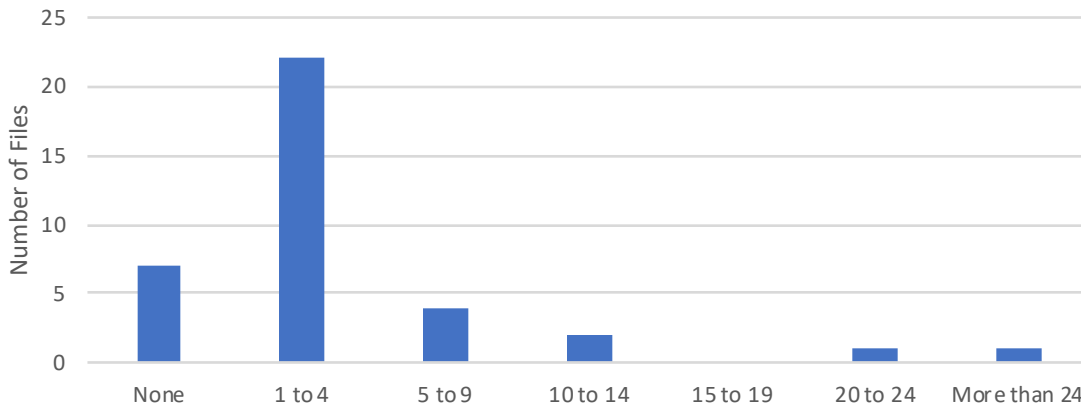
An average of 12.8 potential clients contacted lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* to obtain legal services on an unbundled basis (minimum=0, maximum=75). Most lawyers said that 10 potential clients had contacted them (n=12); see Figure 2.19.



N=40; Missing cases=3

Lawyers took on an average of 4.6 unbundled service files since joining the Alberta Limited Legal Services Project (minimum=0, maximum=50). Most lawyers took on one file (n=8), followed by no files (n=7) and four files (n=7); see Figure 2.20.

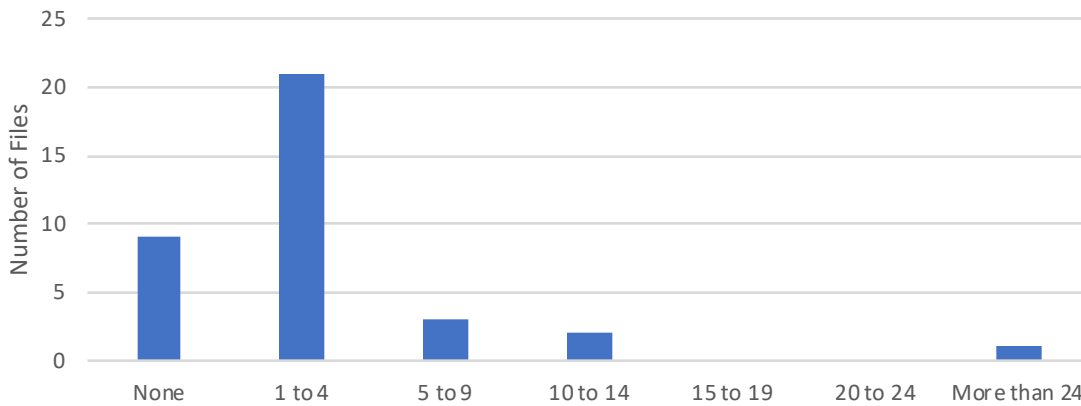
Figure 2.20
 Number of Unbundled Legal Service Files Taken On by Lawyers
 During Project Period



N=40; Missing cases=3

Lawyers reported taking on a slightly lower average of 3.1 unbundled service files in a typical four-month period (minimum=0, maximum=40). Most lawyers took on one file (n=12), followed by no files (n=9) and two files (n=7); see Figure 2.21.

Figure 2.21
 Number of Unbundled Legal Service Files Taken On by Lawyers
 in a Typical Four-month Period



N=40; Missing cases=4

2.5.2 Lawyers’ satisfaction with and reasons for joining the project

Lawyers were asked a number of questions about their reasons for joining the Alberta Limited Legal Services Project and about their satisfaction with the resources provided by the project, including the resources available to clients and to lawyers, the ease of use

of the project website and the exposure provided to lawyers and law firms by the website.

Lawyers were asked to indicate their agreement with a number of statements to assess their reasons for joining the project, such as *To help make legal services more affordable* and *To gain access to a new market of clients*, and could write in a reason for joining the project not included in the statements. Most lawyers said that they joined the project *To improve access to justice for Albertans* (80%), followed by *To help make legal services more affordable* (72.5%) and *To enhance my existing practice* (72.5%); see Table 2.6. Only one lawyer provided a reason for joining the project not included in the statements, writing “I have health problems so this is more flexible.”

Table 2.6
Reasons for Joining the Alberta Limited Legal Services Project

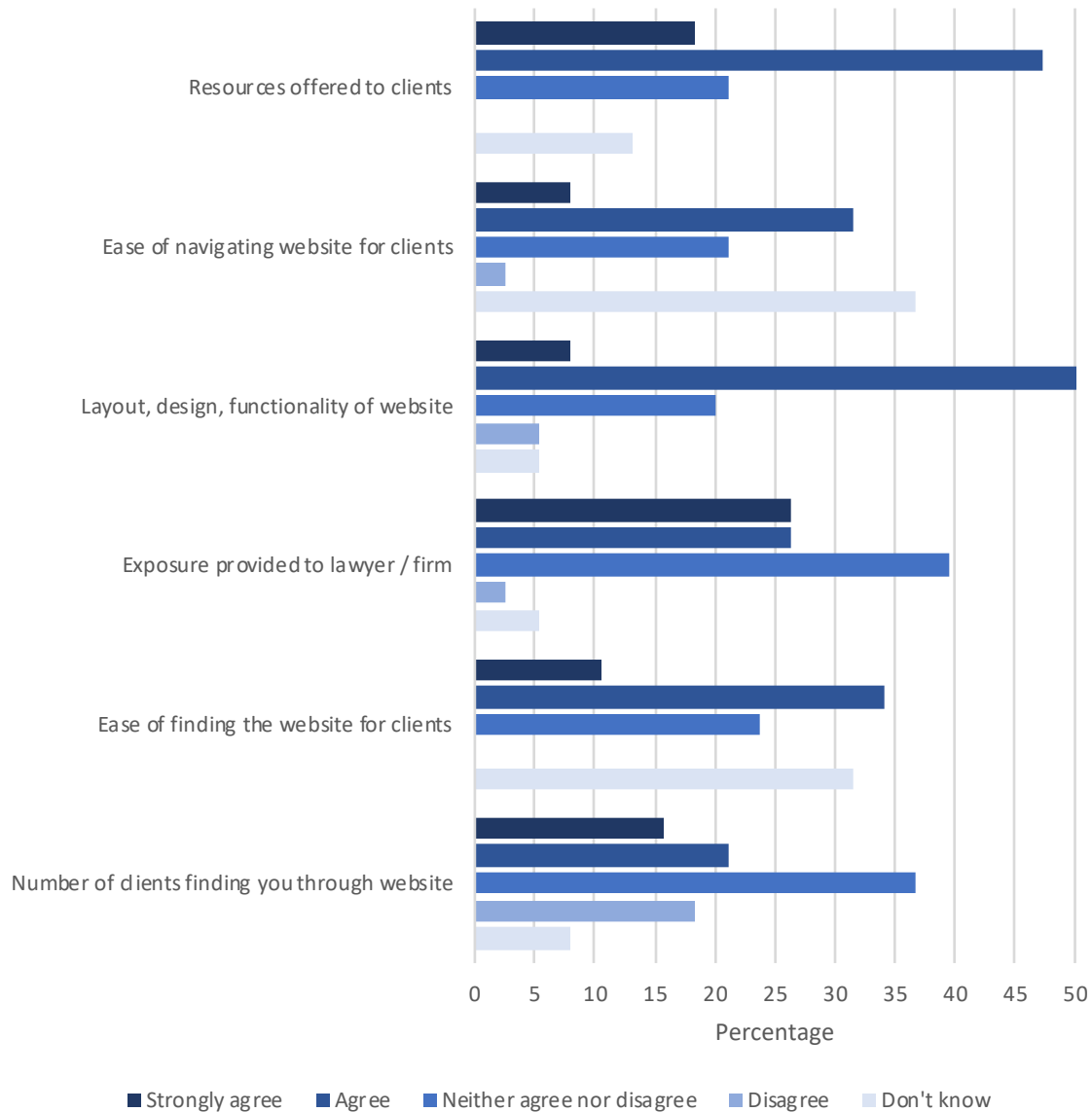
Legal service	%	n
To make legal services more affordable	72.5	29
To improve access to justice for Albertans	80	32
To enhance my existing practice	72.5	29
To help build a new business model for my practice	45	18
To gain access to a new market of clients	50	20
To have an improved lifestyle and/or more job satisfaction	17.5	7
To increase or stabilize revenue for my practice	20	8
To experiment with different practice models	57.5	23
Other	2.5	1

N=40

Multiple response data

Lawyers were asked to express their satisfaction with a number of attributes of the Alberta Limited Legal Services Project to gauge their opinion of the project, including *The resources offered to clients as a part of the website* and *How easy it is for your clients to navigate the website once they find it*; see Figure 2.22. Lawyers were generally *satisfied* or *very satisfied* with the attributes of the project. No lawyers said that they were *very dissatisfied* with any of the project attributes, and the greatest number of lawyers who said they were *dissatisfied* were dissatisfied with *The number of clients who have found you using the website to date* (n=7).

Figure 2.22
Lawyers' Satisfaction with Different Attributes of the
Alberta Limited Legal Services Project



N=40; Missing cases=2

Lawyers who said they were *dissatisfied* or *very dissatisfied* with a project attribute were invited to write in a reason for their dissatisfaction. The majority of these reasons concerned potential clients' belief that unbundled services were going to be provided for free or at a discount:

Clients thought we would give discount. I tell them my full hourly rate, and no client contacted me after that.

I have found that most people calling are looking for pro bono or reduced-fee services.

The only issue with the website is ... clients that think that this is a free service.

... The number of calls received from people using this website seem to be expecting significant discounts and do not seem to be prepared to pay for legal services.

Other lawyers expressed concerns about the volume of contacts from clients out of the jurisdiction or too far away from the lawyer's place of practice:

I got several requests from people out of jurisdiction. I think just the format was a problem. The info was good. So design issues.

The location of the lawyer seems to be a problem I received several enquiries from clients in cities I do not practice in.

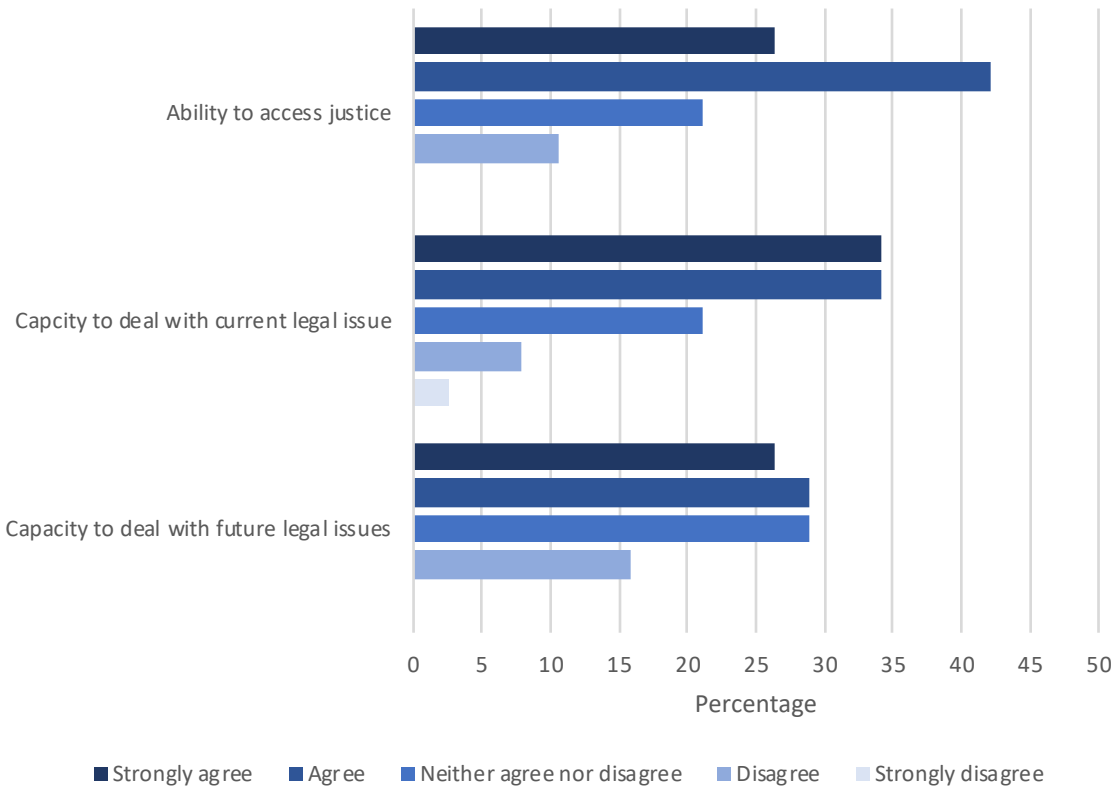
2.5.3 Lawyers' views on the benefits of unbundled legal services for clients

Lawyers were asked a number of questions intended to assess their views of the benefits and drawbacks for clients obtaining unbundled legal services, and, in particular the impact of unbundled services on clients' ability to access justice.

More than two-thirds of lawyers *strongly agreed* or *agreed* that the services they provide on an unbundled basis *increase their clients' ability to access justice* (68.4%); see Figure 2.23. The same proportion of lawyers also *strongly agreed* or *agreed* that the services they provide on an unbundled basis *increase their clients' capacity to deal with their current legal problem*, and a smaller proportion *strongly agreed* or *agreed* that the services they provide on an unbundled basis *increase their clients' capacity to deal with future legal problems* (55.3%).

Figure 2.23

Lawyers' Views of the Effect of Unbundled Legal Services on Increasing Clients' Legal Capacity



N=40; Missing cases=2

Lawyers were asked about their agreement with a number of statements about the effect of unbundled legal services in general, as shown in Figure 2.24:

- a) more than four-fifths of lawyers *strongly agreed* or *agreed* that unbundled legal services *improve the availability of affordable legal services* (81.1%);
- b) a majority of lawyers *strongly agreed* or *agreed* that unbundled legal services *offer price predictability for clients* (71.1%);
- c) less than half of lawyers *strongly agreed* or *agreed* that unbundled legal services *improve outcomes for clients* (44.7%) while a slightly smaller proportion *neither agreed nor disagreed* that unbundled services have this effect (42.1%);
- d) almost two-thirds of lawyers *strongly agreed* or *agreed* that unbundled legal services *enhance clients' empowerment* (63.2%);

- e) a majority of lawyers *strongly agreed or agreed* that unbundled legal services *improve clients' confidence in justice processes and outcomes* (71.1%);
- f) almost two-thirds of lawyers *strongly agreed or agreed* that unbundled legal services *improve access to settlement processes* (65.8%);
- g) almost all lawyers *strongly agreed or agreed* that unbundled legal services *give clients access to tailored legal services* (89.5%);
- h) slightly more than three-quarters of lawyers *strongly agreed or agreed* that access to unbundled legal services *better prepares and familiarizes litigants without counsel with court rules and procedures* (75.7%);
- i) almost four-fifths of lawyers *strongly agreed or agreed* that receiving unbundled legal services *improves the clarity of forms, pleadings and documents for clients* (78.9%);
- j) less than half of lawyers *strongly agreed or agreed* that receiving unbundled legal services results in *shorter, more focused hearings involving litigants without counsel* (47.4%),⁴ while more than one-third of lawyers *neither agreed nor disagreed* that unbundled services have this effect (36.8%);
- k) less than one-third of lawyers *strongly agreed or agreed* that receiving unbundled legal services *reduces the number of hearings involving litigants without counsel* (31.6%), while half of lawyers *neither agreed nor disagreed* that unbundled services have this effect and a further 18.5% *disagreed or strongly disagreed* that they have this effect;
- l) less than one-third of lawyers *strongly agreed or agreed* that unbundled legal services *ensures that outcomes for litigants without counsel are more just* (31.6%), while more than half of lawyers *neither agreed nor disagreed* that unbundled services have this effect (52.6%);
- m) more than half of lawyers *strongly agreed or agreed* that access to unbundled legal services *frees up judicial resources for other matters* (52.6%), while more than quarter of lawyers *neither agreed nor disagreed* that unbundled services have this effect (26.3%);

⁴ The term “litigants without counsel,” also known as “self-represented litigants,” is abbreviated as “SRL” in Figure 2.24.

- n) half of lawyers *strongly agreed* or *agreed* that unbundled legal *improve public perception of the justice system*, while less than one-third of lawyers *neither agreed nor disagreed* that unbundled services have this effect (31.6%); and,
- o) more than half of lawyers *strongly agreed* or *agreed* that unbundled legal *improve public perception of lawyers* (55.3%), while 28.9% lawyers *neither agreed nor disagreed* that unbundled services have this effect.

Figure 2.24
Lawyers' Views of the General Effect of Unbundled Legal Services

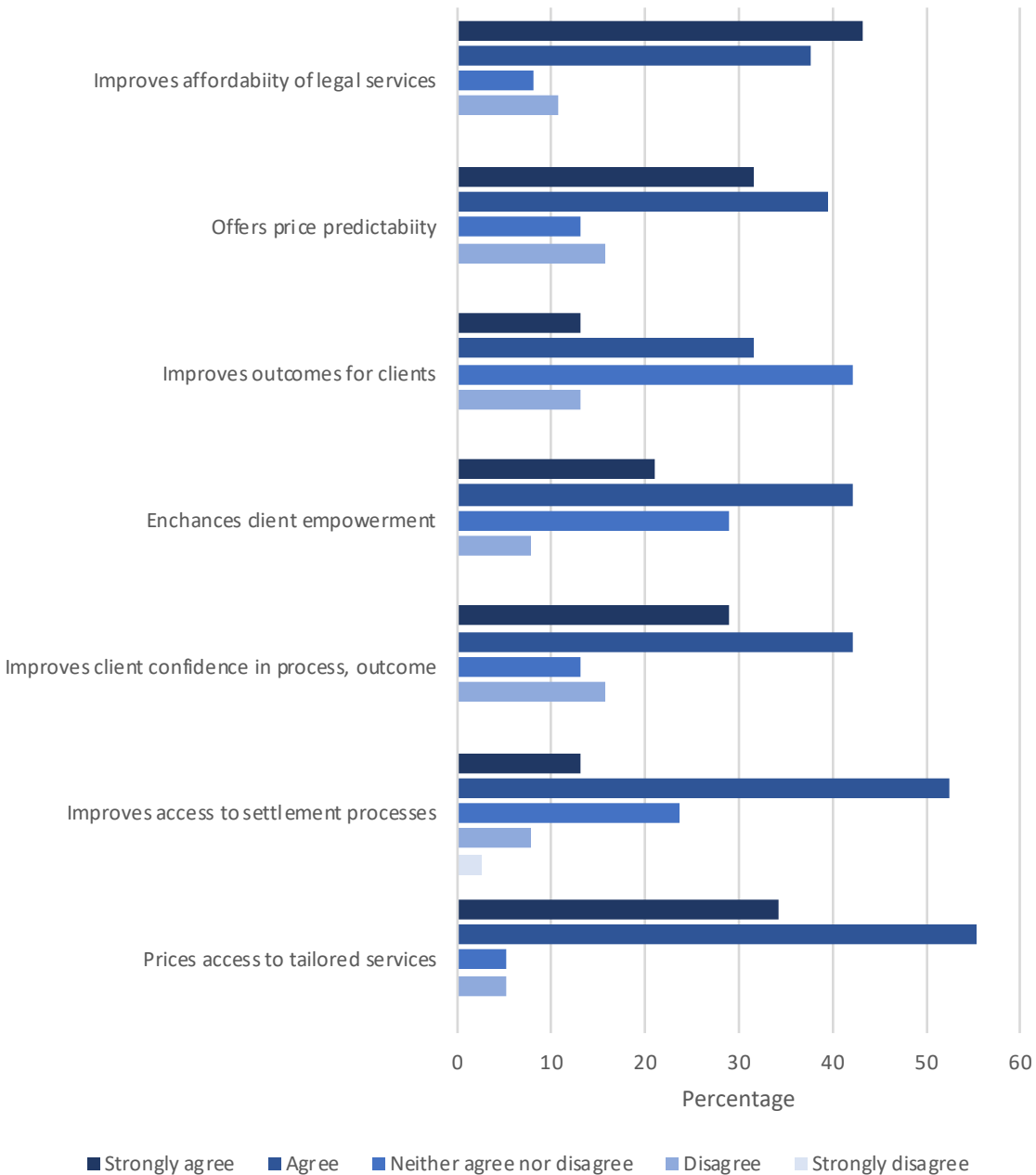
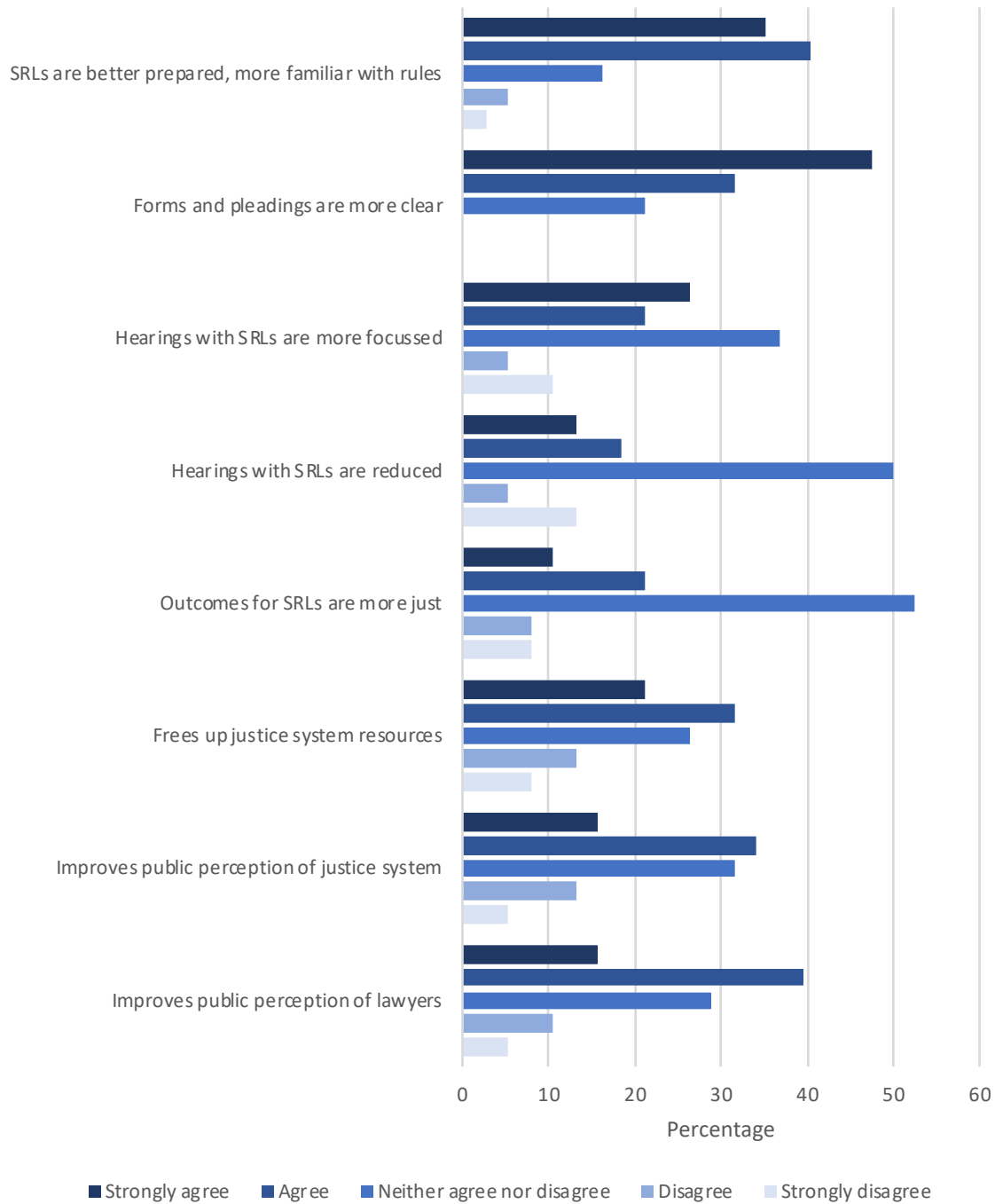


Figure 2.24, continued



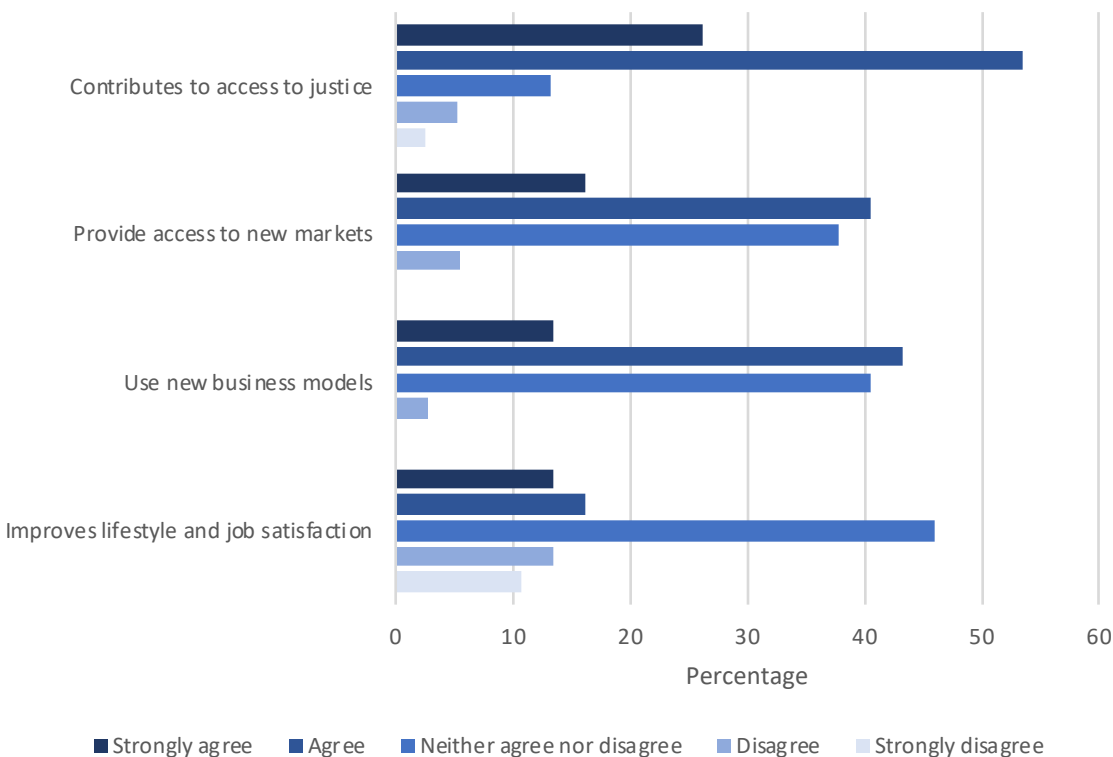
N=40; Missing cases=2

2.5.4 Lawyers' views on the benefits of unbundled legal services for themselves

Lawyers were asked about their agreement with a number of statements about the benefits of providing unbundled legal services on themselves, as shown in Figure 2.25:

- a) almost four-fifths of lawyers *strongly agreed or agreed* that providing unbundled legal services helps them *contribute to improving access to justice* (78.9%);
- b) almost three-fifths of lawyers *strongly agreed or agreed* that providing unbundled legal services gives them *access to new, untapped markets* (56.8%), while almost two-fifths *neither agreed nor disagreed* that unbundled services have this effect (37.8%);
- c) almost three-fifths of lawyers *strongly agreed or agreed* that providing unbundled legal services lets them *use new business models* (56.8%), while more than two-fifths *neither agreed nor disagreed* that unbundled services have this effect (40.5%); and,
- d) less than one-third of lawyers *strongly agreed or agreed* that providing unbundled legal services *improves their lifestyle and job satisfaction* (29.7%), while almost half *neither agreed nor disagreed* that unbundled services have this effect (45.9%) and almost one-quarter *disagreed or strongly disagreed* that it has this effect (24.3%).

Figure 2.25
Lawyers' Views of the Effect of Providing Unbundled Legal Services on Themselves

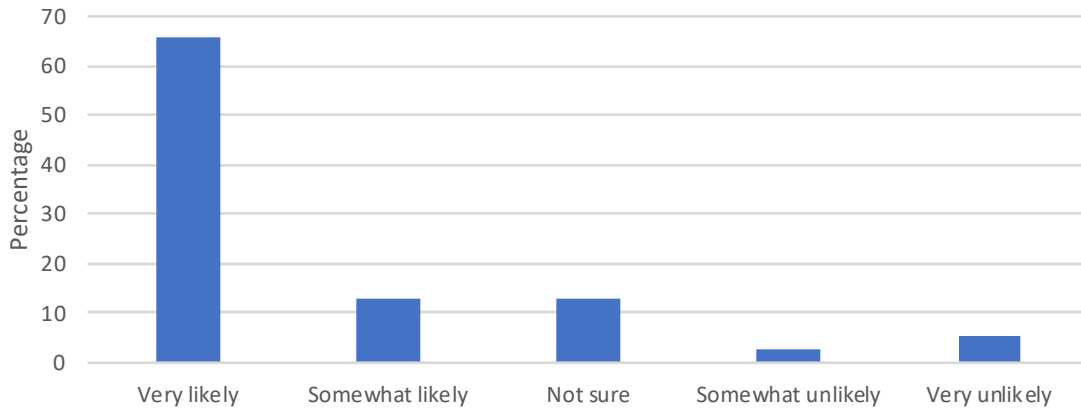


N=40; Missing cases=3

More than three-fifths of lawyers reported that providing unbundled legal services is *less profitable* than their usual, full-retainer work (61.1%) and more than one-third said that providing unbundled services is *equally profitable* as their usual work (36.1%). Only 2.8% of lawyers said that providing unbundled services is *more profitable* than their usual work. However, no lawyers reported that they had self-reported any of their unbundled files to their professional insurer or to the Law Society of Alberta during the period of the project, and none reported that any formal complaints had been made about them in respect of their unbundled files during the period of the project.

The majority of lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* said that they were *very likely* or *somewhat likely* to continue providing unbundled legal services after the conclusion of the Alberta Limited Legal Services Project (78.9%), as shown in Figure 2.26, and half of lawyers said they were interested in collaborating with other lawyers to maintain the project website and offer continuing professional education on providing unbundled legal services after the end of the project.

Figure 2.26
Lawyers' Views on Whether They are Likely to Continue to Provide Unbundled Legal Services After the Project



N=40; Missing cases=2

3.0 SUMMARY, DISCUSSION AND RECOMMENDATIONS

This chapter provides an analysis and discussion of the findings from the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey*, and makes a number of recommendations about the delivery of unbundled legal services in Canada.

3.1 Summary

The data collection period for the *Limited Legal Service Project Clients' Case Survey* ran from 18 April 2017 to 30 June 2018. A total of 56 individuals started this survey. Of these responses, 15 were incomplete, resulting in 41 valid surveys that are analyzed in this paper.

The data collection period for the *Limited Legal Service Project Lawyers' Case Survey* ran from 18 April 2017 to 8 May 2018. A total of 63 surveys were started by 33 individual lawyers. Of these responses, three were incomplete, resulting in 60 valid surveys that are analyzed in this paper.

The data collection period for the *Limited Legal Service Project Lawyers' Retrospective Survey* ran from 15 January 2018 to 30 June 2018. A total of 42 individuals started this survey. Of these responses, two were incomplete, resulting in 40 valid surveys that are analyzed in this paper.

As a result of the structure of the Alberta Limited Legal Services Project and the fact that the three surveys were not restricted to only those providing or receiving unbundled legal services through the project, the total number of individuals providing or receiving unbundled services is unknown and the response rate for the surveys accordingly cannot be calculated.

3.1.1 Demographic information

- Almost three-fifths of clients completing the *Limited Legal Service Project Clients' Case Survey* identified as female (58.5%). Most were between the ages of 35 and 44 (29.3%), and almost half lived in Calgary or Edmonton (48.8%).

- Most clients had incomes of between \$50,000 and \$69,999 per year (19.5%) or between \$15,000 and \$29,999 (17.1%). More than half had attained a college diploma or university degree (53.6%), and only 4.9% had attained less than a high school diploma.
- Slightly more than three-fifths of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* identified as female (60.6%), while slightly less than three-fifths of those completing the *Limited Legal Service Project Lawyers' Retrospective Survey* identified as female (57.5%).
- Almost half of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* were less than 34 years old (48.5%) or were aged 35 to 44 (24.1%). Of the lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey*, however, most were less than 34 years old (45%) or were aged 45 to 54 (22.5%).

3.1.2 Lawyers' practice information

- Two-thirds of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* practiced in the Calgary area or the Edmonton area (66.7%), and a further 18.2% of respondents practiced in Lethbridge or the Red Deer area. Of the lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey*, a similar number practiced in Calgary or Edmonton (70%) or in Lethbridge or Red Deer (20%).
- The majority of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* were called to the bar between 2010 and 2014 (53.2%) and more than one-third were called before 2010 (37.4%). More than two-fifths of lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* were called to the bar between 2010 and 2014 (42.5%) and before 2010 (42.5%).
- Most lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* practiced in a firm of four to six lawyers (30.3%) or a firm of seven to ten lawyers (18.2%). However, most lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* practiced in a firm of seven to ten lawyers (27.5%) or on their own (22.5%).
- The majority of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* provided legal services in two to three areas of the law (51.5%). The most common areas of the law practiced by lawyers completing the *Limited Legal*

Service Project Lawyers' Retrospective Survey were family law (n=34), civil litigation (n=21) and wills and estates (n=19).

- The legal services most commonly provided by lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* on an unbundled basis were initial consultations (n=36), drafting pleadings and other trial court documents (n=36), drafting agreements and other settlement documents (n=35) and reviewing pleadings and other trial court documents (n=34). However, compared to the services offered by respondent lawyers in their ordinary practices, the services more likely to be offered by lawyers on an unbundled basis were coaching services; lawyers were more likely to offer all other categories of service as a part of their ordinary practices than on an unbundled basis.

3.1.3 Clients' experiences of the unbundled legal services they received

- More than three-fifths of clients completing the *Limited Legal Service Project Clients' Case Survey* said that the unbundled services they received were provided by a lawyer on the roster of the Alberta Limited Legal Services Project (63.4%). Most clients found out about the project from the project website (29.3%) or from the lawyer they hired (17.1%).
- Almost three-fifths of clients said that their lawyer asked them to sign a letter or agreement describing the services the lawyer would provide (59.4%), while one-quarter of clients said that their lawyer did not ask them to sign such a document. Less than one-tenth of clients said that they asked their lawyer to do more work or different work than was originally agreed to (9.4%), however none of these clients said that they were asked to sign a new letter or agreement describing the lawyers' services.
- The majority of clients said that they received unbundled legal services because they asked the lawyer to provide such services (72.2%), and more than one-quarter of clients said that they received such services because their lawyer suggested unbundled services (27.8%).
- The legal services most commonly provided on an unbundled basis involved the areas of family law (n=20), wills and estates (n=10), civil litigation (n=6) and child protection (n=5). The type of service most commonly provided took the form of initial consultations (n=28), legal opinions (n=13), coaching on filing and

service processes (n=10), drafting agreements and other settlement documents (n=9), reviewing agreements and other settlement documents (n=8) and follow-up consultations (n=8).

- The services provided were most commonly completed in one day or the same day (45.2% of clients), in 11 to 35 days (16.2%), in six to ten days (16.1%) or in two to five days (12.9%). A large majority of clients said that the services provided were completed either when the client expected (87.5%) or sooner than the client expected (9.4%).
- A large majority of clients were *very satisfied* or *satisfied* with the services provided (87.6%), and only 3.1% said that they were *dissatisfied* with the services provided.
- Almost half of clients said that they *could not* or *probably could not* do the work they hired the lawyer to do (48.4%). Almost one-fifth of clients said that they could have done the work themselves, but without as good a result (19.4%) and slightly more than one-tenth said that they could have done the work themselves, but it would have taken them longer (12.9%).
- Half of clients said that further steps would be required to resolve their legal problem in addition to the services provided by the lawyer, while slightly more than two-fifths said that the services provided resolved their legal problem (40.6%).
- A strong majority of clients agreed that the unbundled legal services they received improved: their ability to resolve their legal problem (83.3%); their confidence in their ability to resolve their legal problem (77.8%); their understanding of the law applicable to their legal problem (88.9%); and, the chances they will get a good resolution to their legal problem (72.2%).
- In terms of the overall impact on clients of receiving unbundled services, a majority agreed that the services they received improved: their understanding of how legal problems are resolved (65.5%); their confidence in dealing with the other people involved in their legal problem (61.5%); their ability to identify other legal problems in the future (53.8%); and, their ability to deal with other legal problems in the future (59.3%). Less than a majority of clients agreed that the services they received improved their confidence in dealing with court and court workers (44.4%).

- In terms of the personal impact on clients of receiving unbundled services, a strong majority of clients agreed that the services they received had a positive impact on: their physical wellbeing (68.7%); their emotional wellbeing (83.4%); and, their financial wellbeing (75.9%).
- Almost four-fifths of clients were charged less than \$1,000 for the services they received (78.2%), including 9.4% of clients who were charged nothing. Most clients said that the lawyer charged a flat rate (43%) or at an hourly rate (34.4%). A large majority of clients described the amount charged as *very reasonable* or *reasonable* (84.4%). Only 6.3% described the amount charged as *unreasonable* and none described the amount as *very unreasonable*.
- A strong majority of clients *strongly agreed* or *agreed* with a number of statements about unbundled legal services. Hiring a lawyer to provide unbundled services is: better than not hiring a lawyer at all (90%); cheaper than hiring a lawyer to handle a legal problem from start to finish (86.7%); lets me choose which services I want the lawyer to perform (93.1%); lets me control how much I spend on my legal problem (86.7%); lets me say how my legal problem is managed (82.8%); and, lets me control how I manage my legal problem (89.7%).

3.1.4 Lawyers' experiences of the unbundled legal services they provided

- Almost three-quarters of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that the client came to them seeking unbundled legal services (71.7%), while the remainder said that they suggested handling the client's legal problem on an unbundled basis (28.3%). Most lawyers said that they interacted with the client in person (49.2%) or online (30.5%).
- The legal services provided by lawyers were most commonly in the areas of family law (n=46) and civil litigation (n=8). The type of service most commonly provided took the form of initial consultations (n=46), drafting pleadings and other trial court documents (n=21), calculating child support or spousal support (n=18), reviewing pleadings and other trial court documents (n=18) and follow-up consultations (n=17).
- The services provided were most commonly completed in less than five business days (45%), with 18.3% of services being completed in one day. More than one-quarter of services were completed in six to 35 days (28.4%) or more than 35 days (26.7%).

- Two-fifths of lawyers said that additional steps would be required to resolve the client's legal problem, while less than one-third said that the services provided resolved the client's problem (30%).
- Almost three-fifths of clients were charged less than \$1,000 for the services they received (61.7%), including 8.3% of lawyers who charged nothing. More than one-third of lawyers said that the amount charged was between \$1,000 and \$9,999 (36.7%). Most lawyers charged for their services at a flat rate (45%); a smaller number charged at an hourly rate (38.3%). Almost all lawyers said that the amount charged for disbursements was less than \$100 (89.8%).
- Almost all lawyers *strongly agreed* or *agreed* that they were satisfied providing unbundled legal services (91.7%), and almost all *strongly agreed* or *agreed* that they would provide unbundled services to other clients (90%).
- A majority of lawyers *strongly agreed* or *agreed* that the unbundled legal services they provided were cost-effective for the client (88.3%) and that the client appeared satisfied with the services provided (88.3%). However, while 80% of lawyers *strongly agreed* or *agreed* that they enjoyed the work they performed for the clients, less than half *strongly agreed* or *agreed* that the work they performed for the client was: *more enjoyable than my usual work* (43.3%); *easier than my usual work* (35%); and, *more profitable than my usual work* (5.1%).

3.1.5 Lawyers' participation in and views of the Alberta Limited Legal Services Project

- During the data collection phase of this study, lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* said that an average of 12.8 potential clients contacted them to obtain legal services on an unbundled basis, and lawyers took an average of 4.6 files on an unbundled basis. Respondent lawyers said that in a typical four-month period, they take an average of 3.1 files on an unbundled basis.
- More than three-fifths of lawyers said that unbundled legal services are less profitable than their usual work (61.1%), and 36.1% said that such services are equally profitable as their usual work.
- Most lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* said that they joined the Alberta Limited Legal Service Project to: improve

access to justice for Albertans (80%); make legal services more affordable (72.5%); and, enhance their existing practices (72.5%). Smaller numbers of respondent lawyers said that they joined the project to: experiment with different practice models (57.5%); gain access to a new market of clients (50%); and, build a new business model for their practices (45%).

- Most lawyers were *very satisfied* or *satisfied* with: the resources offered to clients by the project website (65.8%); the layout, design and functionality of the project website (68.4%); and, the exposure provided to them or their firm by the project (82.6%). Fewer lawyers were *very satisfied* or *satisfied* with the ease of finding the project website for clients (44.7%).
- Lawyers who were *dissatisfied* or *very dissatisfied* with the resources, website and other attributes of the project said that: clients coming to them through the project were expecting free or reduced-rate services; clients were not prepared to pay for services; and, clients were seeking help with legal problems in other jurisdictions or in places in Alberta in which they do not practice.
- Almost four-fifths of lawyers said that they were *very likely* or *somewhat likely* to continue providing unbundled legal services after the conclusion of the Alberta Limited Legal Service Project (78.9%).
- One-half of lawyers said that they were interested in collaborating with others to maintain the project website after the conclusion of the Alberta Limited Legal Service Project.

3.1.6 Lawyers' general views of unbundled legal services

- Most lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* *strongly agreed* or *agreed* that the services they provide on an unbundled basis: increase their client's ability to access justice (68.4%); increase their client's capacity to deal with their current legal problem (68.4%); and, increase their client's capacity to deal with future legal problems (53.3%).
- Most lawyers *strongly agree* or *agree* with statements that, in general, unbundled legal services: give clients access to tailored legal services (89.5%); improve the availability of affordable legal services (81.1%); improve the clarity of forms, pleadings and documents for clients (78.9%); better prepare and familiarize litigants without counsel with court rules and procedures (75.7%); improve

clients' confidence in justice processes and outcomes (71.1%); and, offer price predictability for clients (71.1%). The least number of lawyers *strongly agreed* or *agreed* with statements suggesting that unbundled services: improve outcomes for clients (44.7%); result in shorter, more focused hearings for litigants without counsel (44.7%); reduce the number of hearings involving litigants without counsel (31.6%); and, ensure that outcomes for litigants without counsel are more just (31.6%).

- Most lawyers *strongly agree* or *agree* with statements that unbundled legal services provide personal benefits by: helping them contribute to improving access to justice (78.9%); giving them access to new, untapped markets (56.8%); and, letting them use new business models (56.8%). The least number of lawyers *strongly agreed* or *agreed* with a statement suggesting that unbundled services improve their lifestyle and job satisfaction (29.7%), a statement with which 24.3% of lawyers *disagreed* or *strongly disagreed*.

3.2 Discussion

Most of the individuals completing the *Limited Legal Service Project Clients' Case Survey* were women between the ages of 35 and 64, with a college diploma or university degree, earning between \$30,000 and \$89,999 per year and living in one of Alberta's larger municipalities. Most of these clients received services for legal issues involving family law, will and estates and civil litigation, and the services they received were completed in less than 11 days at a cost of less than \$1,000.

Most of the individuals completing the *Limited Legal Service Project Lawyers' Case Survey* were women who had been called to the bar for four to eight years, practicing in Calgary or Edmonton, either on their own or in a firm of ten or fewer lawyers, and provided services in two or three areas of the law. Most of these lawyers practice family law, followed by civil litigation and wills and estates, but the services provided to clients during the Alberta Limited Legal Services Project were overwhelmingly in the area of family law. The services lawyers provided mostly completed in less than 11 days at a cost to the client of less than \$1,000.

Both clients and lawyers reported high rates of satisfaction receiving and providing unbundled legal services. Clients were satisfied with the cost of the services they received, and the speed with which those services were provided. Although almost all lawyers said that the amount they charged for their unbundled services was either the same as or lower than the amount typically charged in their ordinary practices, the vast

majority of respondent lawyers said they will continue to offer unbundled legal services in the future.

3.2.1 Clients' experience of unbundled legal services

Almost three-quarters of client respondents to the *Limited Legal Service Project Clients' Case Survey* lived in Alberta's municipal areas, with 26.8% of clients stating that they live elsewhere than Calgary, Edmonton, Lethbridge, Red Deer, Medicine Hat, Wood Buffalo, Grand Prairie, Okotoks or Brooks. (In 2018, according to World Population Review, 81% of the Alberta population lived in urban centres and the remaining 19% lived in rural areas.) However, 10% or fewer of lawyer respondents to the *Limited Legal Service Project Lawyers' Case Survey* and lawyers on the roster of the Alberta Limited Legal Services Project reported having practices located elsewhere in Alberta than these municipal areas. Together with the 26.7% of roster members who provide services online and by telephone, these data suggest that clients living in Alberta's rural areas are successfully accessing unbundled legal services.

The area of law with the greatest demand among clients was family law. More than four-fifths of the lawyers on the roster of the Alberta Limited Legal Services Project reported practicing family law, and 76.7% of the lawyer respondents to the *Limited Legal Service Project Lawyers' Case Survey* reported providing services in the area of family law. Although family law lawyers may be more predisposed to provide unbundled legal services than lawyers practicing in other areas of law, the data suggest that the areas of law practiced by lawyers providing unbundled services closely parallels demand among clients seeking unbundled services.

Almost 70% of clients responding to the *Limited Legal Service Project Clients' Case Survey* said that the legal services they received included an initial consultation, and initial consultations made up 17.8% of the 157 legal services received by all clients. Less than half of clients, 43.9%, reported receiving coaching services while coaching services made up 11.5% of the total number of legal services received. Of the seven broad legal service types described in this report – coaching services, document drafting services, document review services, court agent services, consultation services, research and writing services and representation services⁵ -- respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* reported providing every type of service except coaching services less frequently as unbundled legal services than as a part of their ordinary practice. However, almost three-fifths of lawyer respondents said that they

⁵ See Table 2.2 at pages 19 to 21 for a breakdown of the specific services included in each service type.

provide initial consultations as a part of their unbundled service offerings and 70% of lawyers on the roster of the Alberta Limited Legal Services Project included coaching services among the services they were prepared to provide on an unbundled basis. These data suggest that despite the misalignment between lawyers' unbundled service offerings and the unbundled services delivered, clients are nonetheless able to access legal services that lawyers more commonly provide in their ordinary practices.

Slightly more than four-fifths of clients reported that they could not do the work the lawyer provided themselves, or that it would have taken them longer to do the work or that they would not have achieved as good a result, suggesting that the legal services provided on an unbundled basis are services clients need a lawyer to provide. Only 9.7% of clients said that they could have done the work the lawyer provided just as quickly and with just as good a result.

Two-fifths of clients said that the legal services they received resolved their legal problem, while half said that further steps would be required to resolve their problem. Less than one-third of respondents to the *Limited Legal Service Project Lawyers' Case Survey*, reported that the services they provided completely resolved the client's legal problem, and a further three-fifths reported that further steps would be required to resolve the client's problem. As well, clients and lawyers agreed that most of the legal services provided were completed in one day or in less than six days. These data suggest that unbundled legal services are largely being accessed to address one or more elements of a client's overall legal problem, as an alternative to a traditional, full-service retainer, as the term "unbundling" is usually understood. However, a large number of both clients and lawyers view "unbundling" as including one-off services that completely address a legal problem.

The vast majority of clients felt that the amount they were charged for the unbundled legal services they received was reasonable; only 6.3% of clients said that the amount they were charged was unreasonable. Almost four-fifths of clients answering the *Limited Legal Service Project Clients' Case Survey* said they were charged less than \$1,000 for the services they received, while slightly more than three-fifths of lawyers responding to the *Limited Legal Service Project Lawyers' Case Survey* reported charging less than \$1,000 for the services they provided. Both clients and lawyers agree that the most common amount charged was between \$1 and \$499. Given that slightly more than three-fifths of clients prepared to state their income level in their responses to the *Limited Legal Service Project Clients' Case Survey* earned less than \$70,000 per year, these data suggest that unbundled legal services are affordable and that Alberta's low- and middle-income earners are successfully accessing unbundled services.

The vast majority of clients were satisfied with the unbundled legal services they received; only 3.1% of clients said that they were dissatisfied with the services they received. More than three-quarters said that they would not have preferred to hire a lawyer to handle all of their legal problem, and almost all clients said they would hire a lawyer to provide unbundled services in the future. Almost all clients agreed that hiring a lawyer to provide unbundled services is better than not hiring a lawyer at all. These data suggest that unbundled legal services are satisfying the needs of clients seeking those services. Furthermore, a large number of clients agreed that the unbundled services they received had a positive impact on their physical, emotional and financial wellbeing.

More than 70% of clients agreed that the unbundled legal services they received improved their ability to resolve their legal problem, their understanding of the applicable law and the chances they will obtain a good resolution to their problem. The impact of the services received on clients' understanding of the legal system in general was less conclusive. Less than 70% of clients agreed that the services they received improved their understanding of how legal problems are resolved, their ability to identify other legal problems in the future and their ability to deal with other legal problems in the future; only 44.4% of clients agreed that the services they received improved their confidence in dealing with court and court workers. These data show, as would be expected, that the primary impact of unbundled legal services is on clients' present legal problem and that the general effect of such services on clients' overall confidence and understanding of the justice system is weak.

3.2.2 Lawyers' experience of unbundled legal services

Clients and lawyers agreed that lawyers were somewhat more likely to charge for the unbundled services they provide on a flat rate than at an hourly rate, even though anecdotal information suggests that hourly rate and contingency fee arrangements are the most common ways that lawyers bill in their ordinary practices. The data from the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Case Survey* suggest unbundled legal services offer clients a high degree of price predictability relative to legal services offered on a full-service retainer. This is likely a result of the brief period of time legal problems handled on an unbundled basis take to be resolved, or it may be the case that the nature of the services commonly provided on an unbundled basis lends themselves to flat-rate billing.

Less than three-fifths of clients completing the *Limited Legal Service Project Clients' Case Survey* said that they were asked to sign a retainer agreement or letter describing the

services the lawyer would provide, although 15.6% of clients did not know whether the lawyer had asked them to sign such a document. Less than a tenth of clients said that they asked the lawyer to do more work or different work than the lawyer originally agreed to provide, however none of these clients said that they were asked to sign a new retainer agreement or letter describing the additional or different services the lawyer performed. The relatively low rate at which retainer agreements are used, and the fact that retainer agreements were not amended to reflect changes in the terms of the retain, poses a risk to lawyers providing unbundled services should a client challenge the terms of the retainer or the adequacy of the services provided, but may result from the narrowness of the work to be performed. It should be noted that: almost all clients agreed that they clearly understood the work the lawyer was going to provide; no respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* said that they had self-reported any of their unbundled files to their insurer or to the Law Society of Alberta; and, no lawyers said that any formal complaints had been made about them with respect to these files.

Slightly more than half of lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that the amount they charged for the services they provided on an unbundled basis was the same as what they would have charged for those services in their ordinary practices. Slightly more than two-fifths of lawyers said that the amount they charged was less than what they would normally charge for the services provided. Higher numbers of lawyers responding to the *Limited Legal Service Project Lawyers' Case Survey*, more than three-fifths, reported that work performed on an unbundled basis was less profitable than their usual work, and fewer, 36.1%, said that it was just as profitable as their usual work. Given that about 10% of both lawyers and clients said that the lawyer did not charge for services provided, it may be the case that lawyers are less willing to bill for services delivered on an unbundled basis at their ordinary rate, perhaps because of the brevity of the task, the need of the client or the nature of the service provided.

Almost three-quarters of lawyers completing the *Limited Legal Service Project Lawyers' Retrospective Survey* said they were motivated to join the roster of the Alberta Limited Legal Services Project for the altruistic reasons of making legal services more affordable and improving access to justice for Albertans. Although almost three-quarters of lawyers said that they joined to enhance their existing practice, far fewer lawyers said that they joined to build or experiment with a new practice model, gain access to a new market of clients and to increase or stabilize their practice's revenue. The least common reason to join the roster, cited by less than one-fifth of lawyers, was to have an improved lifestyle or more job satisfaction. In fact, less than two-fifths of respondents to

the *Limited Legal Service Project Lawyers' Case Survey* said that the work they performed on an unbundled basis was easier than their usual work, and less than half said it was more enjoyable than their usual work. Contrary to the assertions made in *The Limited Scope Retainer* about the benefits of unbundling, the data do not suggest that roster lawyers joined the Alberta Limited Legal Services Project to increase their job satisfaction, open up an existing practice to new clients or reduce stress.

Despite the lower profitability of providing unbundled legal services, almost all lawyers completing the *Limited Legal Service Project Lawyers' Case Survey* said that they were satisfied providing such services, and that they would continue to provide such services in the future. However, one of the most common complaints about the Alberta Limited Legal Service Project expressed by respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* was that too many potential clients who were contacting respondent lawyers expected services for free or at a reduced rate.

Lawyers perceived the services they provided on an unbundled basis as having high value for the client. Almost all respondents to the *Limited Legal Service Project Lawyers' Case Survey* said that the work they performed was cost-effective for the client and that the client was satisfied with their work. The majority of respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* said that the work they performed increased their clients' ability to access justice, deal with their legal problem and deal with future legal problems. The majority also agreed that unbundled services enhance clients' empowerment, improve clients' confidence in the justice system, improve access to settlement processes and improve the clarity of forms and pleadings. However, these respondents were much less likely to agree that the services they provided improve actual outcomes for their clients.

Lawyers were, however, pessimistic about the larger impacts of providing unbundled legal services on the justice system as a whole. Less than two-thirds of respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* said that unbundled legal services result in shorter court hearings involving litigants without counsel, reduce the number of hearings involving litigants without counsel, ensure that outcomes for litigants without counsel are more just, free up judicial resources for other matters, improve public perception of the justice system and improve public perception of lawyers.

3.2.4 Conclusions

The findings from the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey* support the following conclusions:

- a) unbundled legal services are being used by low- and middle-income Albertans, including by Albertans living in rural areas of the province;
- b) clients understand the nature of unbundled legal services and public demand for such services is strong;
- c) services provided on an unbundled basis are inexpensive and conclude quickly;
- d) clients obtaining unbundled services are satisfied with the cost and speed of delivery of those services, usually cannot perform those services themselves and would not prefer to have hired their lawyer on a traditional, full-service retainer;
- e) the highest demand for unbundled services is in the areas of family law, wills and estates and civil litigation;
- f) clients feel that receiving unbundled legal services improves their ability to resolve their legal problem, their understanding of the applicable law and the likelihood of obtaining a good result to their legal problem;
- g) receiving unbundled legal services has a weaker but still important impact on clients' general understanding of how legal problems are resolved, and on their ability to identify and address future legal problems;
- h) clients and lawyers perceive "unbundling" as including tasks that completely address a client's legal problem, as well as tasks that address only a part of a client's legal problem;
- i) lawyers are satisfied providing unbundled services, even though such services are less remunerative than the services they provide as a part of their ordinary practices, and intend to continue offering unbundled services in the future;
- j) lawyers feel that providing unbundled legal services helps them contribute to improving access to justice and making legal services more affordable;

- k) lawyers are, however, less confident that providing unbundled legal services improves the outcomes for clients or has positive benefits for the justice system where litigants are not represented by counsel;
- l) lawyers believe that their clients are satisfied with the unbundled legal services they provided, and that unbundled services improve clients' ability to access justice, address their current legal problem and resolve future legal problems; and,
- m) retainer letters describing the scope of services to be delivered on an unbundled basis are not used with sufficient frequency, and those that are executed are not being amended to reflect changes in the scope or nature of the services provided.

3.3 Recommendations

The findings from the *Limited Legal Service Project Lawyers' Case Survey*, the *Limited Legal Service Project Clients' Case Survey* and the *Limited Legal Service Project Lawyers' Retrospective Survey* also support a number of recommendations about the delivery of legal services on an unbundled basis:

- a) lawyers and organizations providing unbundled services must be careful, in all of their communications to clients and referral sources, to emphasize that their unbundled services are not being provided for free or at a reduced rate;
- b) lawyers and organizations providing unbundled services must be careful to state the location in which they practice, the extent to which lawyers are prepared to travel, the areas of the law they practice and the services they provide on an unbundled basis;
- c) frontline referral sources, including Legal Aid, court workers and legal advice clinics, should continue to be educated about unbundled legal services as an alternative to a client going without legal advice or legal representation, including the limitations of unbundled services;
- d) lawyers providing unbundled legal services should continue to be educated by law societies and organizations providing unbundled services about the professional obligations and risks inherent in providing such services, including the importance of executing retainer agreements and amending those agreements when the scope or nature of the unbundled services changes; and,

- e) efforts to encourage more lawyers to provide legal services on an unbundled basis should continue to be made, especially among lawyers practicing in the areas of family law, wills and estates and civil litigation.

Further research on clients' and lawyers' experiences with and views of unbundled legal services is also recommended. In particular, a study should be conducted of potential clients who failed to obtain legal services on an unbundled basis to answer questions including the following:

- a) in which areas of the law is it the most difficult to obtain unbundled legal services?
- b) which specific legal services are the most difficult to obtain on an unbundled basis?
- c) were any requests for unbundled services rejected by lawyers and, if so, what were the reasons given?

3.4 Postscript

One of the objects of the Alberta Limited Legal Services Project was to create a pool of lawyers trained to provide unbundled legal services that might continue past the conclusion of the project. The fact that half of respondents to the *Limited Legal Service Project Lawyers' Retrospective Survey* said that they were interested in collaborating with others to maintain the project website after the end of the project was a positive indication that such a group might well continue.

On 27 June 2018, the author and a group of lawyers on the roster of the Alberta Limited Legal Services Project, including Amanda Baretta, Michael Birnbaum, Ksenia Court, Deanna Koebernick, Heather Malaryk, Christina Matthews, Ken Proudman, and Megan Tupper, met by teleconference and agreed to incorporate a non-profit society to take over the project website, administer the roster of project lawyers, produce resources to support and educate lawyers and the public on unbundling and provide continuing professional education for lawyers on the unbundling of legal services. A pool of lawyers providing unbundled services will survive the end of the project.

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GLOSSARY

Mean: The mean is the average response to a question. It is calculated by adding up all of the responses received and then dividing the resulting sum by the total number of responses.

Missing Cases: The number of responses on individual questions that are not available. The most common reason for missing cases in survey or interview data is that the respondent chose not to answer a particular question. In file review data, missing cases are usually the result of the relevant information not being included in the file.

Multiple Response Data: Multiple response data refers to questions in which respondents are allowed to choose more than one answer. In tables where multiple response data are presented, the percentages presented for individual items may total more than 100.

N and n: N refers to the total number of respondents to a survey or interview or the total number of files that were available for review while n refers to a subset of the total responses that may be selected for specific data analyses. For example, if 100 people respond to a survey, $N = 100$. If 30 of those respondents identify as female, then $n = 30$ females and $n = 70$ males.

Range: The lowest and highest responses from the range of responses received to a question.

Representativeness: The extent to which the responses to a survey or interview are likely to reflect the responses that would be given if every potential respondent could be surveyed or interviewed.

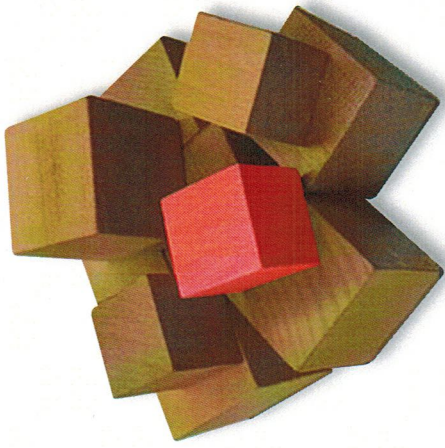
Response Rate: The percentage of completed surveys out of the total number distributed to potential respondents. In the case of interviews, the response rate refers to the number of completed interviews out of the total number of individuals contacted for an interview.

SPSS: Statistical Package for the Social Sciences, a widely used software program for analyzing social science data.

APPENDICES

- A. Alberta Limited Legal Services Project brochure for lawyers
- B. Alberta Limited Legal Services Project website, excluding list of participating lawyers and downloadable resources
- C. Client survey reminder card
- D. PowerPoint presentation, 10 March 2017
- E. Press release, 18 April 2017
- F. Text of surveys:
 - 1. *Limited Legal Service Project Clients' Case Survey*
 - 2. *Limited Legal Service Project Lawyers' Case Survey*
 - 3. *Limited Legal Service Project Lawyers' Retrospective Survey*

APPENDIX A



To more information and to register, please
contact us at:

■ Robert G. Harvie, Q.C.

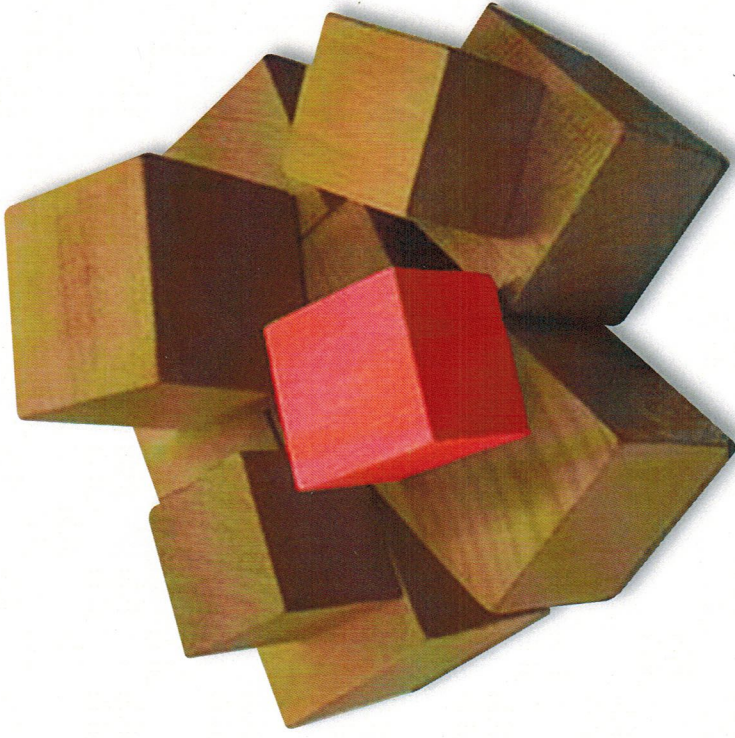
Email: rg@huckvale.ca

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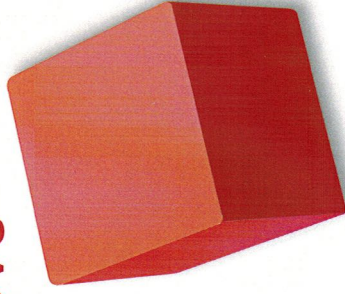
Telephone: 403-216-0340



Limited Scope Retainer Project

Helping Lawyers
and the
Public They Serve

Can lawyers improve access to justice in Alberta, without being asked to do free or discounted legal work?



If you could expand your clientele and provide legal services at your usual hourly rate, but with reduced overhead and receivables, while providing a referral source for judges, court administrators, Legal Aid, community legal clinics and other organizations helping people willing to pay, would you?

The Limited Scope Retainer Project (LSRP) is being undertaken by a steering committee made up of members of the Law Society of Alberta, the CBA Alberta, PBLA, Legal Aid, the Alberta government and the Canadian Research Institute for Law and the Family, and is aimed at promoting and studying limited scope retainer work in Alberta.

Limited scope retainers, also known as unbundled or short legal services, are retainers in which lawyers provide an agreed number of specific legal tasks for their clients, as negotiated with their clients. Typical limited scope work ranges from drafting affidavits to providing opinions to providing advice at initial consultations, and is performed with no expectation that any further legal services are required or will be performed.

Limited scope work is approved by the Law Society of Alberta, which passed a series of amendments to the Code of Conduct in 2013 intended to heighten awareness and use of limited scope retainers.

We are looking for volunteer lawyers to help the project, which will entail:

Registering for the project – Each lawyer will have their bio, photo and contact information displayed on a dedicated, stand-alone website aimed at marketing volunteer lawyers to people seeking limited scope work.

Receiving training and support – Lawyers will be given training in providing limited scope work and the ethical issues involved in such work. Participating lawyers will have access to vetted model retainer agreements and other resources to help support their limited scope work.

Providing your services – Participating lawyers will be asked to recommend working on a limited scope basis to clients when, in their opinion, the approach suits the client and the case. Lawyers should aim to enter into at least one limited scope retainer every two or three months

Promoting your services – The LSRP website and your contact information will be promoted throughout the legal community in Alberta by the Law Society of Alberta, the CBA Alberta, PBLA, Legal Aid, court administration, community legal clinics and others.

Providing feedback on your experience – Upon finishing a limited scope retainer, you and your client will separately complete very brief online surveys of your experiences, with occasional interviews by the LSRP researchers, to gauge your satisfaction with and views on providing limited scope work.

This data will be collated and analyzed at the end of the information-gathering phase of the LSRP (estimated to be 18 months), following which a report will be prepared and distributed to help guide lawyers and policy-makers about the implications and use of limited scope legal work, and to improve future limited scope services for both lawyers and their clients.

APPENDIX B

The Alberta Limited Legal Services Project

[LIMITED LEGAL SERVICES](#) · [INFORMATION FOR CLIENTS](#) · [PARTICIPATING LAWYERS](#)
[ABOUT THE PROJECT](#) · [INFORMATION FOR LAWYERS](#) · [CONTACT US](#)

Welcome!

The Alberta Limited Legal Services Project is an initiative of local lawyers aimed at providing Albertans with access to the legal services they want, when they want them, at a price they can afford.

Lawyers traditionally provide their services on a contingency basis, usually for car accident and personal injury cases, or at an hourly rate, usually for family law and commercial cases. With both kinds of work, lawyers usually expect to handle the case from beginning to end. Although this approach isn't a problem in contingency cases, where the lawyer doesn't get paid unless he or she is successful, hourly rate cases can become expensive very quickly.

The Limited Legal Services Project connects Albertans with lawyers who will help with just part of the case, not all of it. Limited legal services include: giving legal advice, including second opinions; drafting court papers, such as applications and affidavits; drafting other legal documents like wills and powers of attorney; going to court for settlement conferences or hearings; and, providing on-going advice and coaching while you run your own legal case. Limited legal services are sometimes called *limited scope retainers* and *unbundled legal services*.

The Limited Legal Services Project wants to understand more about people's satisfaction with limited legal services, including the satisfaction of clients as well as lawyers. A report on the outcomes of the project is being prepared by the [Canadian Research Institute for Law and the Family](#) and will be available on the Institute's website by the end of August 2018.

Click [here](#) to learn more about limited legal services or visit the [participating lawyers](#) page to find a lawyer providing limited legal services near you.



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The Alberta Limited Legal Services Project

[LIMITED LEGAL SERVICES](#) · [INFORMATION FOR CLIENTS](#) · [PARTICIPATING LAWYERS](#)
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About the Project

Over the last ten to twenty years, lawyers, judges and others involved in the justice system have become increasingly worried about the ability of Albertans and other Canadians to hire lawyers to help them with legal problems. Research shows that when people can't afford to hire a lawyer, they are less likely to engage in the legal processes that will help them right a wrong, or defend themselves when they have been sued or accused of a crime, and are more likely to represent themselves in court. Reports by the [Canadian Research Institute for Law and the Family](#) say that people involved in court cases without lawyers tend to have problems with court processes, problems with the law that applies to their situations and tend to achieve results that are worse than the results achieved by people with lawyers.

In 2013, Professor [Julie Macfarlane](#), of the [University of Windsor](#), published a [study](#) showing that many people who can't afford or don't want to hire a lawyer to help them for *all* of a legal problem do want to hire a lawyer to help them with *part* of their legal problem. However, Professor Macfarlane also found that "relatively few" of the people she spoke to "were successful in accessing legal services on this basis."

We believe that providing limited legal services, rather than the usual sort of legal services in which a lawyer is hired to handle a problem from beginning to end, can help people access justice. The [Canadian Bar Association](#) and the [Law Society of Alberta](#) agree.

The Alberta Limited Legal Services Project promotes the use of limited legal services, in the expectation that short legal services like these are more affordable than hiring a lawyer on a full-service retainer, and intends to increase the number of Alberta lawyers who are willing to work on this basis. But we also want to find out how satisfied people are with limited legal services, how helpful this sort of service is, and whether accessing limited legal services really does improve people's ability to resolve their legal problems. A report on the outcomes of the project is being prepared by the Canadian Research Institute for Law and the Family and will be available on the Institute's website by the end of August 2018.

The Limited Legal Services Project has been developed by a group of Alberta lawyers led by Rob Harvie QC, of the Lethbridge firm [Huckvale LLP](#), and [John-Paul Boyd](#), of the [Canadian Research Institute for Law and the Family](#) in Calgary, and is generously supported by grants from the [Law Foundation of Ontario](#) and the [Alberta Law Foundation](#). We are grateful for the Law Foundation's support and commitment to improving access to justice for all Canadians.

Click [here](#) to learn more about the Limited Legal Services Project. Visit the [limited legal services](#) page to learn

more about the sort of legal work participating lawyers in the project can do for you, and the **participating lawyers** to find a lawyer providing limited legal services in your neighbourhood.



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The Alberta Limited Legal Services Project

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Limited Legal Services

Lawyers are usually hired to take a case from beginning to end, which can get a little expensive. When you hire a lawyer to provide a limited legal service, you're hiring the lawyer to perform a specific task or to do just a part of your case. You may have hired a lawyer to provide a limited legal service before, if you've bought or sold a house or had a will drawn up.

The Alberta Limited Legal Services Project is about helping lawyers provide more limited legal services to more clients, and about letting people who might not otherwise be able to hire a lawyer know that other options are available. There are a lot of limited services that lawyers can provide without having to be hired to do more work, including:

- giving legal advice about a legal problem, including second opinions
- giving an opinion about an agreement
- notarizing a document
- doing research about a legal problem
- preparing court documents
- writing an affidavit
- preparing a legal argument
- going to court with you or on your behalf
- writing a letter for you
- preparing a settlement offer, or reviewing a settlement offer you have received

In a family law case, for example, a lawyer can give you advice about the likely result if your case goes to trial, or explain how the law about guardianship and the care of children, or the division of property works. A lawyer can also calculate the amount of child support and spousal support that might be payable, or help you decide which of the children's expenses both parents will have to pay toward. A lawyer could make an application for child support

on your behalf, help you write a separation agreement or get you divorced.

Not every kind of legal problem can be handled like this. It is usually very difficult for a lawyer to run a trial, for example, unless the lawyer has been involved in the steps leading up to the trial. The lawyer you talk to will tell you if the sort of service you would like her to perform is one that can be done on its own.

Learn [more](#) about the Limited Legal Services Project.



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Join the Project

The Limited Legal Services Project is open to all Alberta lawyers who are prepared to provide limited scope or unbundled legal services. Although the project focusses on family law, being the area of greatest need, all lawyers are welcome to our team. There is no cost to join the project, and new lawyers can join at any time.

What you get

Participating lawyers will receive a brief **introductory training session** on providing limited legal services and access to the project resources found below, including:

- a model retainer agreement
- best practices and recommended practices
- frequently asked questions
- legal and academic articles on limited scope services

Most importantly, the services of participating lawyers are promoted on this website and through the registry of lawyers providing limited legal services maintained by the **National Self-Represented Litigants Project**.

What you do

We ask that you recommend working on a limited scope basis to current and prospective clients whose circumstances are suitable for limited scope work. Ideally, we would like you to take at least one file on a limited scope basis every three or four months, however this is *not* a requirement of participation in the project. Ultimately, the client and the nature of the client's problem will dictate whether limited scope work, versus a full retainer, is appropriate.

You will provide your services on limited scope files *at your usual rate*, whether hourly or flat. *No discount or other consideration is required.*

Sign up

To join the project or for additional information, please contact **Rob Harvie QC** or **John-Paul Boyd**.

Project Resources

The following are a variety of resources that have been assembled for the use of lawyers volunteering with the Limited Legal Services Project, and anyone else with an interest in providing limited scope or unbundled legal services. Additional quality resources are available in the Family Law Unbundling toolkit developed by MediateBC and hosted on the website of [Courthouse Libraries BC](#).

We expect these resources to grow and develop over the life of the project. If you have any resources which should be added to this collection, please contact [Rob Harvie QC](#) or [John-Paul Boyd](#).

The following resources can be downloaded by clicking the links provided. To save a particular document rather than loading it within your browser, right-click and select *save linked file* or *save link as*.

Project training resources

Introduction to the Alberta Limited Legal Services Project: Webinar

Law Society of Alberta

Download: [link](#)

Recording of the webinar provided by Rob Harvie QC and John-Paul Boyd introducing the Alberta Limited Legal Services Project on 10 March 2017. (50 minutes)

Introduction to the Alberta Limited Legal Services Project: PowerPoint

Harvie, Boyd

Download: [PDF](#) · [PPTX](#)

PowerPoint slides from the webinar provided by Rob Harvie QC and John-Paul Boyd introducing the Alberta Limited Legal Services Project on 10 March 2017.

Professional and ethical considerations

Code of Conduct

Law Society of Alberta

Download: [PDF](#)

Excerpts from the Code of Conduct and commentary on limited scope work.

The Advisory

Law Society of Alberta

Download: [PDF](#)

Excellent article by Nancy Carruthers, law society practice advisor, on the ethical issues involved in limited scope retainers.

Model retainer agreement

Model Retainer Agreement

Limited Legal Services Project

Download: [PDF](#) · [DOCX](#)

Model retainer agreement prepared by the Limited Legal Services Project. This agreement is a template that must be adapted to the specific circumstances of the client, the services being provided and the problems being addressed. Volunteer lawyers are not required to use this model agreement.

Practice guides and guidance

The Limited Scope Retainer

Canadian Bar Association Alberta

Download: [PDF](#)

A good, wide-ranging discussion of the opportunities and challenges offered by limited scope work in Alberta, with contributions from Justice Jerke, Justice Marriott, Marie Gordon QC, Rob Harvie QC, Nancy Caruthers, Julie Macfarlane and others.

Client Intake Guide

MediateBC, Harvie, Boyd

Download: [PDF](#)

General guidance on client intake in limited scope matters. Includes a list of factors to consider and questions to ask in assessing whether the particular issue you are being asked to handle is appropriate for a limited scope retainer.

Best Practices for Unbundling

MediateBC, Harvie, Boyd

Download: [PDF](#)

A list of professional and practices considerations for Alberta family law lawyers providing limited scope services.

The Nuts and Bolts of Unbundling

Macfarlane, Imbrogno

Download: [PDF](#)

A broad, detailed resource for lawyers providing limited scope services prepared by Julie Macfarlane and Lidia Imbrogno of the National Self-Represented Litigants Project.

Unbundling FAQs for Lawyers

MediateBC, Harvie

Download: [PDF](#)

A list of frequently asked questions and their answers, prepared by Rob Harvie QC based on FAQs originally prepared by MediateBC.

Limited scope work in the media

Top Judges Push for Unbundled Legal Services

Lawyers Weekly

Download: [PDF](#)

Article by Ann Macaulay on the work of the National Self-Represented Litigants Project, unbundling and the support for unbundled services offered by the bench.

Introducing the Alberta Limited Legal Services Project

Slaw

Download: [PDF](#) · [link](#)

Article by John-Paul Boyd on the Limited Legal Services Project, published on Slaw on 20 January 2017.

Need a Lawyer but Don't Qualify for Legal Aid? Project Aims to Slash Fees for Albertans

CBC

Download: [link](#)

Article by Allison Dempster on the Limited Legal Services Project, published on CBC's news website on 19 April 2017.

Materials for your office and your clients

Guide for Clients

Institute for the Advancement of the American Legal System, Harvie

Download: [PDF](#)

A guide for clients about the opportunities and challenges of limited scope work, and when a limited scope approach may not be best for a particular legal problem, suitable for distribution by participating lawyers.

Project Poster

Boyd

Download: [PDF](#)

A poster describing the Limited Legal Services Project aimed at clients, and intended for distribution by lawyers and legal clinics. This handsomely-designed 8.5 x 11" colour poster will brighten up any work space or waiting area.

Project Brochure

Boyd

Download: [PDF](#)

A brochure about the Limited Legal Services Project aimed at clients, and intended for distribution by lawyers, legal clinics, court staff and other justice system stakeholders. If you're a project lawyer, we will send you a number of brochures by post; we encourage you to please print extra copies for your reception as well as local courthouses and legal clinics.

Frequently Asked Questions

This section addresses common questions about the Limited Legal Services Project. It will be updated from time to time as the need to clarify project resources and processes arises. If you are a lawyer and have questions about the project, please send them to John-Paul Boyd at jpboyd@ucalgary.ca.

Joining the roster

How do I sign up?

Easy. First, send a photo of yourself and a short, three- to four-sentence bio to [John-Paul Boyd](#) at the Canadian Research Institute for Law and the Family. Second, go to www.surveymonkey.com/r/B9SS862 and tell us about the areas of law in which you'd like to provide limited scope services and the sorts of specific services you'd like to provide. Be sure to fill out the identification questions at the end so we know to whom your responses belong. Third, watch the [introductory video](#) for an overview of the project, information about how we'll be collecting data and a description of the very limited things we're going to ask you to do as a participant in this project. Within a week, your information will be posted to the project roster and you will receive a pack of business-card sized survey reminders to give to your clients when you finish a limited scope file.

Is the project open to articling students?

No, not at this time. However, the data collection period runs until September 2018, and you can participate in the project at any time between your call to the bar and then.

Do I really need to watch the introductory training video?

Yes. The [video](#) is informative but relatively short. In addition to discussing the nature of limited scope work, the video describes the very modest requirements of your participation in the project, and helps us to ensure that all roster lawyers have a common baseline understanding of limited legal services and the project.

Project resources

Why aren't the project resources accessible only to participating lawyers?

We decided to make these resources available to participating lawyers and clients alike for the sake of transparency more than anything else. There's nothing confidential about these materials, nothing in them that reflects badly on participating lawyers and nothing that couldn't or shouldn't be shared with clients. We also believe that it's important to make these resources as widely-available as possible to promote access to justice in Canada and to help anyone interested in replicating or repurposing this project elsewhere.



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The Alberta Limited Legal Services Project

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Information for Clients

Lawyers are usually paid on a contingency basis, meaning that they get paid if and when they are successful, or on an hourly rate. Contingency work is great for some legal problems, like those involving car accidents, but isn't practical for other problems, like criminal charges or family law disputes. In cases like these, lawyers will charge for their work at their hourly rate or, sometimes, at a flat fee that is agreed on ahead of time.

The lawyers involved in the Alberta Limited Legal Services Project will charge you at their usual hourly rate. Some lawyers will work for a flat rate, if the service you would like them to perform can be done at a flat rate. However, the lawyers won't handle all of your legal problem, just a part of it.

Click [here](#) to download a brochure describing the project. Click [here](#) to download a copy of a helpful Guide for Clients prepared by Rob Harvie QC.

Finding a lawyer

To hire a lawyer, first go to the [participating lawyers](#) page and look for lawyers in your community. Call or email one or two of the listed lawyers and arrange a time to meet with them. Make sure the lawyers know that you're looking to hire them for a limited legal service.

When it's time to meet the lawyer, be sure to bring the documents and other materials that relate to your legal situation with you. Explain your problem to the lawyer, and ask the lawyer for her opinion about your case and whether what you need can be done on its own, without the lawyer having to deal with other aspects of your case. Use the meeting to decide how you feel about the lawyer and her approach to legal problems and whether you feel confident in her abilities.

Hiring a lawyer

If you decide that you want to hire the lawyer, ask the lawyer how much she thinks her services will cost and ask how much money the lawyer needs to start work on your problem. Most lawyers will want to be given a deposit (called a *retainer*) before they begin. The lawyer may want you to provide a retainer that is equal to the amount she thinks the work will likely cost; this is especially likely if the work you want her to do is very brief or if the lawyer has agreed to be paid a flat rate for her services.

The lawyer will prepare a contract (called a *retainer agreement*) describing the terms of her services, including her hourly rate, the tasks she charges for and whether interest will accumulate on unpaid bills, and describing the

work you have asked her to perform. This document is very important. Not only does it outline your financial obligations to the lawyer, it states exactly what the lawyer has agreed to do for you, how you can ask the lawyer to do more work than agreed to and how the retainer agreement will be changed if more work needs to be done.

Make sure you ask whether the lawyer has everything she needs to get started, or whether there are additional documents and information that she has to have first, before you leave. Also ask when the lawyer will be able to start working on your problem.

You don't have to hire the first lawyer you meet. You're entitled to shop around and make sure that the fit between you and the lawyer is right!

Resolving a problem

All lawyers in Alberta are members of the **Law Society of Alberta**. The Law Society exists to protect the public and make sure that lawyers perform their services in an ethical, competent way. If you have a problem with the lawyer you have hired, first try to talk her about why you are dissatisfied. Most lawyers are very concerned that their clients are happy with their work. If you don't want to talk to the lawyer or feel it wouldn't be helpful, then call the Law Society. No fees are charged to talk to the Law Society and you don't need to hire a lawyer.

The Limited Legal Services Project is not responsible for the lawyers involved, the work they perform or for the amount they charge for their work. If you are unhappy with the lawyer you have hired, please contact the Law Society.

Frequently Asked Questions

This section addresses common questions about the Limited Legal Services Project. If you are in need of legal services, please visit the **roster** of lawyers participating in the project and contact one or more of the listed lawyers.

Using other lawyers

Are project lawyers the only lawyers who do limited legal work?

No. Other lawyers may be prepared to limited legal services. You are *not* limited to the lawyers who are participating in this project!

Hiring roster lawyers

Can you introduce me to a lawyer?

Sure, but honestly we'd rather not. That's why we've created this website. To find a lawyer, go the go to the **participating lawyers** page and look for lawyers in your community who work in the area of law you need help with. Call or email one or two of the listed lawyers and arrange a time to meet with them. Make sure the lawyers know that you're looking to hire them for a limited legal service.

Can I change my mind and ask the lawyer to manage all of my case for me?

You certainly can, however the lawyer also has to have the time to help with your full case. For most lawyers, limited legal services are relatively easy to fit into their schedules. Although full cases involve a lot more work and can be difficult to shoehorn into a busy calendar, it certainly doesn't hurt to ask. You and your lawyer will talk about whether it's possible for her to take all of your case.



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The Alberta Limited Legal Services Project

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Contact Us

If you would like more information about limited legal services or the Alberta Limited Legal Services Project, please contact Rob Harvie QC, of the Lethbridge firm [Huckvale LLP](#), or John-Paul Boyd, of the [Canadian Research Institute for Law and the Family](#) in Calgary. **Do not use this contact information if you need legal assistance.** The purpose of this project is to help people needing limited legal services meet lawyers trained and willing to provide them. The project does not provide legal services itself.

If you are in need of legal services, please visit the [roster](#) of lawyers participating in the project and contact one or more of the listed lawyers.

Rob Harvie

Email: rgh@huckvale.ca

Phone: 403-328-8856

John-Paul Boyd

Email: jpboyd@ucalgary.ca

Phone: 403-216-0341

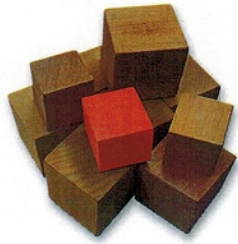
Interested in replicating or repurposing this project? Please contact John-Paul for information about how the Alberta Limited Legal Services Project was developed and editable copies of the materials we have prepared.





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APPENDIX C



The Alberta
**Limited
Legal Services
Project**

*Client Survey.
You could win a
\$100 Visa gift card!*

Now that your lawyer has finished, we need you to tell us what you think of limited legal service. Please fill out our confidential survey:

www.surveymonkey.com/r/LLS_CLIENT

This survey is anonymous and won't identify you as your lawyer's client. Clients who complete our survey are eligible to enter a monthly draw for a \$100 prepaid Visa gift card.

albertalegalservices.com

APPENDIX D

The Alberta
Limited Legal Services
Project

An introduction to the Limited Legal Services Project
for participating lawyers

Rob Harvie QC, *Huckvale LLP*

John-Paul Boyd, *Canadian Research Institute for Law and the Family*

Friday 10 March 2017

Summary

1. Limited legal services and access to justice
2. How the project came to be
3. Expectations of participating lawyers
4. Ethical considerations
5. Introduction to the model retainer agreement and other project resources for lawyers
6. After the project

1. Limited legal services

Limited legal services

- Legal piece work, providing clients with one or more of the individual legal services that may be needed over the lifetime of a dispute
- Alternative to usual cradle-to-grave approach to legal work, and expectation that lawyer will handle all matters associated with a file until last appeal is exhausted
- Also called “unbundling,” “limited scope retainer,” “discrete legal services,” etc.

Typical services

- Initial consultations
- Independent legal advice, second opinions
- Drafting documents, including contracts, demand letters, arguments and pleadings
- Drafting affidavits
- Preparing or advising on settlement offer
- Appearing in court on behalf of client
- Conducting questioning, securing discovery

Rationale for unbundling

- Low- and middle-income individuals can't afford traditional full-scope legal services
- Addresses negative public perceptions about lawyers' cost and unaffordability
- Improves clients' ability to access justice
- Few other reasonable, or probable, alternatives to making lawyers' services more affordable
- Limited services are *in demand* and yet few lawyers provide them

Benefits of limited scope work

- Few collections issues
- Files are closed quickly, have less chance to devolve into dog files
- Can pick and choose the work you want to do
- Pays at exactly the same rate as your usual work, *not* a form of charity
- Excellent for lawyers returning to practice or looking for part-time situation
- Improves work-life balance

Drawbacks of limited scope work

- Must be crystal clear about scope of work will do for client and work will not do for client
- Must be clear about whether you are going on record or becoming an address for service
- Must be clear in communications to counsel and court about role in case
- Files don't have continuing financial benefit over long term

2. Background

Project background

- Offshoot of project of people involved in CBA Alberta's Access to Justice Committee
- Pet project of Rob's, largely responsible for moving project forward and maintaining momentum
- Goals of project fit with objects of Canadian Research Institute for Law and the Family
- Opportunity to gather first empirical data about usefulness of limited scope work: does it have the effect we think it does or not?

Funding

- Current plan for project based on Rob's earlier vision
- Funding sought without success from Gov't of Alberta, Law Society of Alberta, Law Foundation of Alberta, others
- Grant received from cy-près fund administered by Law Foundation of Ontario
- Institute managing project and responsible for evaluation

The project

- 2-year term, following which Institute will produce final report and participate with Rob in disseminating results to justice system stakeholders and policy-makers
- 18-month data collection period, information to be collected from
 - Participating lawyers
 - Clients of participating lawyers

The project

- Project will be promoted among provincial and local bar associations, trial court benches, court administrators, legal clinics and other client-facing groups
- Pamphlets have been prepared for potential volunteer lawyers
- Pamphlets and business cards are being prepared for clients and stakeholder distribution
- Project website is at albertalegalservices.com

Ulterior motives

- We also want the project to:
 - Significantly increase awareness of limited scope services among the bench, bar and public
 - Encourage lawyers to provide limited scope work as a means of improving access to justice in Alberta, and dispel the myths and preconceptions that discourage lawyers from providing limited services
 - Have a lasting effect on how legal services are provided in the province
- The results of this project *will* have a national impact

3. Expectations

Participating in the project

- Participants may join or leave the project at any time, without restriction
- All participants are asked to watch this introductory webinar to ensure a common baseline of information
- All participants are asked to provide a photo and biographical information for the project website

Expectations of participants

- You will recommend taking part of a client's case on a limited scope basis only when limited scope work suits:
 - The client and the client's circumstances
 - The legal problem or issue
- *Do not* recommend limited scope retainer approach to file if it's not appropriate!
- No expectations as to volume of limited scope files, but taking a file on a limited scope basis every 3 or 4 months would be good goal to set

You and your services

- You may charge for your services as you wish, no discount or other consideration is required
- Please let us know if you are providing services on a flat-rate basis, this information should be included in your bio on the website
- We will promote you and your services through the project website for the duration of the project
- Participants will also be listed in the database of the NSRLP

Evaluation obligations

- You will complete a *brief* electronic survey at the conclusion of each limited scope file
- You will refer the client to a separate, longer electronic survey and do what you reasonably can to encourage the client to complete that survey
 - Pre-paid Visa cards have been arranged to incentivize client participation
- You will complete a longer, but still relatively short, electronic survey every 5 or 6 months to obtain your retrospective opinions

Surveys

- Responses to all surveys are anonymous and kept in confidence
- Client surveys cannot and will not be linked to lawyer surveys
 - You *will not* be identified as your clients' counsel
 - You *will not* be identified or identifiable from your survey responses
- Survey results will be reported in aggregate only

4. Ethical considerations

Ethical considerations

- Lawyers' ethical and competency obligations not diminished
- Specific to limited scope retainers:
 - R.2.27 ARC – if appearing in court, must inform court orally, or before appearance in writing;
 - Code of Conduct 3.2-2 – must confirm in writing what services will be provided
 - Code of Conduct 3.1, Commentary [8] - Lawyers owe clients a duty of competence, regardless of whether the retainer is a full service or a limited scope retainer. When a lawyer considers whether to provide legal services under a limited scope retainer, the lawyer must consider whether the limitation is reasonable in the circumstances. For example, some matters may be too complex to offer legal services pursuant to a limited scope retainer.
- *Meehan v Good*, 2017 ONCA 103: duty beyond retainer

5. Resource materials

Resource materials

- Website: www.albertalegalservices.com
- Materials:
 - Model Limited Legal Services Retainer Agreement;
 - Client Intake and Unbundling Guide;
 - Unbundling FAQ's for lawyers;
 - Limited Legal Services Best Practices;
 - Excerpt from Code of Conduct;
 - Nancy Carruthers "Ethics of Limited Scope Retainers" (Practice Advisor, Law Society of Alberta)
 - Law Matters Issue: "The Limited Scope Retainer"

Model retainer agreement

- No **REQUIREMENT** to use our model agreement
- Whatever agreement you use:
 - Clear indication of what you ARE doing and ARE NOT doing
 - Recommend reading verbatim with Client
 - Do NOT work beyond scope of your agreement without additional written agreement
 - Read *Meehan v Good* – obvious risks to clients should be disclosed to them in writing, especially limitation periods

6. After the project

Products of the project

- The project will result in a final report that analyzes the survey data and makes recommendations for future research, policy reform, procedural reform and best practices in limited scope services
- The report will be disseminated as widely as possible, including through the media and presentations to the bench, bar and appropriate community groups

Participating lawyers

- We hope that participating lawyers will find value in continuing to associate with each other, and might:
 - Form a practice association to develop standards, best practices and ethical guidelines and promote limited scope work
 - Continue to operate as the Alberta Limited Legal Services Project or something like it
- We will happily transfer the website and all practice resources provided for, or produced during, the project to any practice groups that form after completion

The Alberta
Limited Legal Services
Project

An introduction to the Limited Legal Services Project
for participating lawyers

Rob Harvie QC, *Huckvale LLP*

John-Paul Boyd, *Canadian Research Institute for Law and the Family*

Friday 10 March 2017

APPENDIX E

The Alberta **Limited Legal Services** Project

FOR IMMEDIATE RELEASE

New Project Improves Access to Justice, Affordability of Lawyers

Innovative project to produce first research on impact of limited scope legal services.

<http://albertalegalservices.com/>

Calgary, 18 April 2017: Rob Harvie QC and John-Paul Boyd today announced the launch of the [Alberta Limited Legal Services Project](http://albertalegalservices.com/), an exciting new program aimed at improving Albertans' access to justice. 43 lawyers, located across the province and practicing in the most requested areas of law, have agreed to provide limited legal services – giving clients the services they want, when they want them, at a price they can afford – for the 18-month period of the project.

Lawyers are normally hired to handle a case from start to finish, which can quickly become unaffordable. Studies show that the high cost of lawyers is a factor in most people's decisions to go to court on their own, and that even middle-income Canadians are often unable to hire a lawyer to manage their legal problems.

Limited legal services, also called *limited scope retainers* and *unbundled legal services*, allow people to hire a lawyer for just one or two tasks rather than all of a case. The lawyer might provide advice or an opinion, coach someone through a difficult court application or disclosure process, prepare an argument or an affidavit, or advise on responding to a lawsuit or settlement offer.

Limited legal services are expected to help people navigate Canada's complicated court system, increase the chances that justice will be done and improve people's capacity to respond to legal problems. However, no studies have yet been done to prove that limited services have this effect. The Alberta Limited Legal Services Project will fill this gap in the research. The Canadian Research Institute for Law and the Family will survey both lawyers and clients during the data-collection phase of the project to learn about the usefulness of limited services and assess clients' and lawyers' satisfaction with legal work provided on this basis.

Harvie said that this project "will show lawyers that limited legal services are profitable and rewarding, and can easily be integrated into the busiest of law practices." Boyd says that "this

project will have a huge impact on access to justice throughout Alberta and across Canada,” by “encouraging lawyers to provide brief legal services, and by letting people who struggle to pay for legal help know that affordable alternatives to the usual cradle-to-grave approach exist.”

Robert G. Harvie QC is a lawyer with [Huckvale LLP](#), a Lethbridge law firm, and a Bencher of the Law Society of Alberta. Rob has practiced family law for more than 30 years. He presently serves as the Chair of the [National Self Represented Litigants Project](#) Advisory Board.

John-Paul E. Boyd is a family law lawyer and the Executive Director of the [Canadian Research Institute for Law and the Family](#), an independent non-profit organization affiliated with the University of Calgary. He is the founding author of the wikibook [JP Boyd on Family Law](#) and a regular speaker on family law subjects for judges, lawyers and the public.

The Alberta Limited Legal Services Project is organized by Rob Harvie and John-Paul Boyd with an ad hoc steering committee of Alberta lawyers, and is generously funded by a grant from the [Law Foundation of Ontario](#). Although services in all areas of the law are available, the project focusses on family law, being the area of the greatest and most urgent need. Lawyers may join the project at any point during the data-collection phase, which runs from April 2017 to September 2018. The final report will be available at the end of October 2018.

Contact Information

Project website:

albertalegalservices.com

Rob Harvie QC, organizer:

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rgh@huckvale.ca
403.380.4050 office
403.331.3921 cell

John-Paul Boyd, organizer and researcher:

Canadian Research Institute for Law and the Family, Calgary AB
jboyd@ucalgary.ca
403.216.0340 office
587.225.2490 cell

APPENDIX F



Limited Legal Services Project - Clients' Survey

In order to improve the delivery and use of limited legal services in Alberta, we would like to know about your recent experience.

If you hired a lawyer with the Alberta Limited Legal Services Project to provide limited legal services and the lawyer recently finished providing those services, we'd like you to complete this survey. Your participation is completely voluntary, and you do not have to answer any questions that you don't want to answer.

If you are a roster lawyer, please complete the lawyers' survey when you have finished a limited services case here: https://www.surveymonkey.com/r/LLS_LAWYER

Your responses to this survey are anonymous and you will not be identified as your lawyer's client. Your lawyer will not be told whether you have completed this survey or about your responses. Your participation in this study will have no effect on any future services you may receive.

All of the information you provide will be stored securely and confidentially by the Canadian Research Institute for Law and the Family, and only members of the research team will have access to it. At the end of the project, a research report will be prepared that will combine your responses with those of other participants.

This survey should take you ten minutes or less to complete. People who complete the survey are eligible to be entered into a monthly draw for a \$100 prepaid Visa gift card. You can enter this draw at the end of the survey.

If you have any questions or concerns about this survey or the Alberta Limited Legal Services Project, please contact John-Paul Boyd, of the Canadian Research Institute for Law and the Family, at 403-216-0340 or jpbayd@ucalgary.ca.

First, a bit about you:

How old are you?

- 18 to 24 years
- 25 to 34 years
- 35 to 44 years
- 45 to 54 years
- 55 to 64 years
- 65 to 74 years
- 75+ years
- Prefer not to answer

What is your gender?

- Male
- Female
- Other
- Prefer not to answer

What is your approximate annual income?

- Under \$15,000
- \$15,000 to \$29,999
- \$30,000 to \$49,999
- \$50,000 to \$69,999
- \$70,000 to \$89,999
- \$90,000 to \$120,000
- Over \$120,000
- Prefer not to answer

What is the highest level of education you have achieved?

- Less than a high school diploma
- High school diploma
- Some university or college
- College diploma
- University degree
- Post-graduate or professional degree
- Prefer not to answer

Where do you live?

- Calgary or Edmonton
- Lethbridge or Red Deer
- Medicine Hat, Wood Buffalo or Grand Prairie
- Okotoks or Brooks
- Somewhere else in Alberta
- Prefer not to answer



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Limited Legal Services Project - Clients' Survey

About the legal services you received:

Were the limited legal services you received provided by a lawyer on the roster of the Alberta Limited Legal Services Project?

Yes No Not sure

How did you find out about the Limited Legal Services Project?

- The lawyer I hired told me about it
- Another lawyer told me about it
- I learned about it from a legal clinic
- I learned about it from a judge
- I learned about it from a court worker
- Other (please specify)
- I found the website for the project
- I saw the brochure for the project
- I heard about it on TV, radio or in the newspaper
- A friend/relative told me about it

Did you ask your lawyer to work for you on a limited basis?

- Yes, I asked the lawyer to provide legal services that were limited in some way
- No, the lawyer suggested that he or she provide limited legal services and I agreed

What area of law was involved in the legal problem the lawyer helped you with? (please check all that apply):

- | | |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> adoption | <input type="checkbox"/> estate planning, trusts, wills and estates |
| <input type="checkbox"/> adult guardianship and trusteeship | <input type="checkbox"/> family law, divorce |
| <input type="checkbox"/> business law, commercial leases | <input type="checkbox"/> human rights |
| <input type="checkbox"/> child protection, child welfare | <input type="checkbox"/> immigration and refugee law |
| <input type="checkbox"/> civil litigation | <input type="checkbox"/> insolvency, bankruptcy and foreclosure law |
| <input type="checkbox"/> corporate/commercial, shareholders disputes, directors liability | <input type="checkbox"/> legal research/writing, legal opinions |
| <input type="checkbox"/> criminal law | <input type="checkbox"/> personal injury law |
| <input type="checkbox"/> debtor and creditor law | <input type="checkbox"/> residential tenancy |
| <input type="checkbox"/> employment law | <input type="checkbox"/> small claims |
| <input type="checkbox"/> Other (please specify) | |



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Limited Legal Services Project - Clients' Survey

What legal services did the lawyer provide to you? (check all that apply, choosing the most specific answers possible)

Coaching

- coaching for trial court appearances
- coaching for appeals
- coaching for negotiation, mediation or arbitration
- coaching for questionings
- coaching for disclosure and discovery process
- coaching on filing and service processes

Drafting Documents

- drafting pleadings and other trial court documents
- drafting appeal documents
- drafting demand letters
- drafting orders
- drafting settlements and agreements
- drafting wills, powers of attorney and personal directives

Reviewing Documents

- reviewing pleadings and other trial court documents
- reviewing appeal documents
- reviewing demand letters
- reviewing orders
- reviewing settlements and agreements
- reviewing financial disclosure made or received

Filing Processes

- filing pleadings and other court documents
- entering orders

Consultations

- initial consultation for legal advice and information
- follow-up consultation for legal advice and information
- independent legal advice on agreements

Legal Research and Writing

- providing legal research
- giving a legal opinion

Going to Court with You or on Your Behalf

- appearing in Provincial Court
- appearing in Court of Queen's Bench
- appearing in Court of Appeal
- appearing before tribunal
- appearing at questionings
- appearing at negotiation, mediation or arbitration

Resolving Problems outside Court

- conducting negotiations
- conducting mediation
- conducting arbitration

Enforcement

- enforcing judgments
- enforcement of agreements

Calculations

- calculating child support or spousal support
- calculating division of property
- calculating income

Other services (please specify)



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Limited Legal Services Project - Clients' Survey

Did the lawyer ask you to sign a letter or agreement describing the work the lawyer would do for you?

Yes No Don't know

When the lawyer started working for you, how clearly did you understand the work the lawyer was going to do for you?

- Very clear, I understood exactly what the lawyer was going to do for me
- Clear
- Neither clear nor unclear
- Not clear
- Very unclear, I wasn't at all sure what the lawyer was going to do for me

Did you ever ask the lawyer to do more work or different work than the work the lawyer first agreed to do?

Yes No Don't know

If you asked the lawyer to do more or different work, did the lawyer ask you to sign a new letter or agreement describing the work the lawyer would do?

Yes No Don't know



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Limited Legal Services Project - Clients' Survey

About the amount you were charged and the value you received:

About how much did the lawyer charge you?

- | | |
|---------------------------------------------------|--------------------------------------------|
| <input type="radio"/> The lawyer didn't charge me | <input type="radio"/> \$2,000 to \$4,999 |
| <input type="radio"/> \$1 to \$249 | <input type="radio"/> \$5,000 to \$9,999 |
| <input type="radio"/> \$250 to \$499 | <input type="radio"/> \$10,000 to \$19,999 |
| <input type="radio"/> \$500 to \$999 | <input type="radio"/> \$20,000 to \$39,999 |
| <input type="radio"/> \$1,000 to \$1,999 | <input type="radio"/> \$40,000 or more |

How did the lawyer calculate the amount charged?

- The lawyer billed by the hour
- The lawyer charged a flat rate
- Don't know
- Other (please specify)

Was the amount the lawyer charged you reasonable?

- Very reasonable, I got good value for what I paid
- Reasonable
- Neither reasonable nor unreasonable
- Unreasonable
- Very unreasonable, I paid a lot more than I should have for what I got

How many days did it take from your first meeting with the lawyer until the date the lawyer's work was finished?

- 1 business day / same day
- 2 to 5 business days
- 6 to 10 days
- 11 to 15 days
- 16 to 25 days
- 26 to 35 days
- 36 or more business days

Was the lawyer's work completed as quickly as you thought it would be?

- Yes, the lawyer was finished when I expected
- No, the lawyer was faster than I expected
- No, the lawyer was slower than I expected

On the whole, are you satisfied with the work the lawyer performed for you?

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

Was there anything the lawyer could have done to improve your satisfaction with the work the lawyer performed for you?



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Limited Legal Services Project - Clients' Survey

About your legal problem

Did the services the lawyer provided resolve your legal problem?

- Yes, the services that were provided resolved my problem
- No, other steps are required to resolve my problem
- Don't know

If other steps are required to resolve your legal problem, did the help you got from the lawyer:

	Yes	No	N/A
Improve your ability to resolve your legal problem?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve your confidence that you will be able to resolve your legal problem?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve your understanding of the law that applies to your legal problem?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve the chance that you'll get a good resolution to your legal problem?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Could you have done the work you hired the lawyer to do for you?

- Yes, but it would have taken me longer
- Yes, but without as good a result
- Yes, just as quickly and with just as good a result
- Probably not
- No
- Don't know

Did the help you got from the lawyer:

	Yes	No	N/A
improve your understanding of how legal problems are resolved?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
improve your confidence dealing with the court and court workers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
improve your confidence dealing with other people involved in your legal problem, including the other side?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
improve your ability to identify other legal problems in the future?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
improve your ability to deal with other legal problems in the future?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Limited Legal Services Project - Clients' Survey

About limited legal services

Would you have preferred to hire a lawyer to manage all of your legal problem, not just the part that this lawyer managed?

Yes No

How much do you agree or disagree with these statements?

Hiring a lawyer to provide limited legal services:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
is better than not hiring a lawyer at all	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
is cheaper than hiring a lawyer to handle a legal problem from start to finish	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
lets me choose which services I want the lawyer to perform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
lets me control how much I spend on my legal problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
lets me say how my legal problem is managed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
lets me control how I manage my legal problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Would you consider hiring a lawyer to provide limited legal services in the future?

Yes No

To what extent do you agree that the help you received from the lawyer had a positive impact on your:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Physical well-being	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emotional well-being	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial well-being	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Is there anything else that you'd like to tell us about your experience hiring a lawyer to provide limited legal services?

Thank you very much for your time.

If you have any questions or concerns about this survey or the Limited Legal Services Project, please contact John-Paul Boyd, of the Canadian Research Institute for Law and the Family, at 403-216-0340 or jpboyd@ucalgary.ca.

The findings from the survey will be published on the Institute's website at www.crilf.ca in the fall of 2018. We welcome your feedback and comments about this and the Institute's other work.

To enter the monthly draw, please click the "Next" button at the bottom of this page.



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Limited Legal Services Project - Clients' Survey

If you would like to be entered into our monthly draw for a \$100 Visa gift card, please give us your name and an email address to reach you at. Your name will be entered in the draw for the month in which you complete the survey. Your name and email address will not be published and will not be linked to your answers to this survey. Your identifying information will be deleted following the monthly draw.

Name

Email address



Limited Legal Services Project - Lawyers' Survey

Thank you for your participation as a lawyer with the Alberta Limited Legal Services Project.

You should fill out this survey every time you finish a limited scope file during the data collection period of the project (1 April 2017 to 30 September 2018), whether you believe the client to have come to you through the project or not.

If you are a client and have received limited legal services from a roster lawyer, please complete the clients' survey here: https://www.surveymonkey.com/r/LLS_CLIENT

This survey should take you less than five minutes to complete once you've become familiar with the survey questions.

Your responses to this survey are anonymous and you will not be identified as the client's lawyer; your responses and your client's responses will never be linked. All data are stored securely and confidentially by the Canadian Research Institute for Law and the Family, and will only be expressed in aggregate format.

About you:

What is your age?

- | | |
|------------------------------------------|-----------------------------------------|
| <input type="radio"/> Less than 25 years | <input type="radio"/> 55 to 64 years |
| <input type="radio"/> 25 to 34 years | <input type="radio"/> 65 to 74 years |
| <input type="radio"/> 35 to 44 years | <input type="radio"/> 75 years or more |
| <input type="radio"/> 45 to 54 years | <input type="radio"/> Prefer not to say |

What is your gender?

- Male Female Other Prefer not to say

What is the primary location of your practice?

- Online / by telephone
- Office in Calgary (including Airdrie) or Edmonton (including Sherwood Park)
- Office in Lethbridge or Red Deer (including Sylvan Lake)
- Office in Medicine Hat, Wood Buffalo or Grand Prairie
- Office in Okotoks or Brooks
- Office elsewhere in Alberta

What was the year of your first call to the bar in Canada?

In how many areas of law do you personally provide legal services?

- 1
- 2 to 3
- 4 to 6
- 7 or more

How many lawyers are in your firm?

- Just me
- 2 to 3 lawyers, including me
- 4 to 6 lawyers
- 7 to 10 lawyers
- 11 to 15 lawyers
- 16 to 25 lawyers
- More than 25 lawyers



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Limited Legal Services Project - Lawyers' Survey

About the file you have finished:

Did the client come to you / your firm knowing about the Alberta Limited Legal Services Project?

Yes No Don't know

Did the client come to you / your firm seeking legal services on a limited scope basis?

- Yes, the client asked for limited scope work
- No, I suggested that legal services be provided on a limited scope basis

What area of law did the file involve? (please check all that apply)

- | | |
|-------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| <input type="checkbox"/> administrative law | <input type="checkbox"/> employment law |
| <input type="checkbox"/> adoption | <input type="checkbox"/> estate planning, trusts, wills and estates |
| <input type="checkbox"/> adult guardianship and trusteeship | <input type="checkbox"/> family law, divorce |
| <input type="checkbox"/> business law, commercial leases | <input type="checkbox"/> human rights |
| <input type="checkbox"/> child protection | <input type="checkbox"/> immigration and refugee law |
| <input type="checkbox"/> child specialist | <input type="checkbox"/> insolvency, bankruptcy and foreclosure law |
| <input type="checkbox"/> civil litigation | <input type="checkbox"/> legal research/writing, legal opinions |
| <input type="checkbox"/> corporate/commercial, shareholders disputes, directors liability | <input type="checkbox"/> personal injury law |
| <input type="checkbox"/> criminal law | <input type="checkbox"/> residential tenancy |
| <input type="checkbox"/> debtor and creditor law | <input type="checkbox"/> small claims |
| <input type="checkbox"/> Other (please specify) | |

What limited services were performed? (please check all that apply, choosing the most specific answers possible)

Coaching

- coaching for trial court appearances
- coaching for appeals
- coaching for negotiation, mediation or arbitration
- coaching for questionings
- coaching for disclosure and discovery process
- coaching on filing and service processes

Drafting documents

- drafting pleadings and other trial court documents
- drafting appeal documents
- drafting demand letters
- drafting orders
- drafting settlements and agreements
- drafting wills, powers of attorney and personal directives

Reviewing documents

- reviewing pleadings and other trial court documents
- reviewing appeal documents
- reviewing demand letters
- reviewing orders
- reviewing settlements and agreements
- reviewing financial disclosure made or received

Filing processes

- filing pleadings and other court documents
- entering orders

Consultations

- initial consultation
- follow-up consultation
- independent legal advice on agreements

Legal research and writing

- legal research
- legal opinion

Appearances on behalf of client

- appearing before Provincial Court, application
- appearing before Provincial Court, trial
- appearing before Provincial Court, other purpose
- appearing before Queen's Bench, application
- appearing before Queen's Bench, trial
- appearing before Queen's Bench, other purpose
- appearing before Court of Appeal
- appearing before tribunal
- appearing at questionings
- appearing at negotiation, mediation or arbitration

Conducting non-court dispute resolution

- conducting negotiations
- conducting mediation
- conducting arbitration

Enforcement actions

- enforcing judgments
- enforcement of agreements

Calculations

- calculating child support or spousal support
- calculating division of property
- calculating income

Other limited legal services not specified

How did you mainly interact with the client?

- Online
- By telephone
- In person at my office
- In person, elsewhere

Did the work you performed resolve the client's problem?

- Yes, the services I provided resolved the client's legal problem
- No, other steps are required to resolve the client's legal problem
- Don't know



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Limited Legal Services Project - Lawyers' Survey

About the services you provided:

What was the approximate amount charged to the client for your PROFESSIONAL SERVICES only:

- | | |
|------------------------------------------|--------------------------------------------|
| <input type="radio"/> \$0 | <input type="radio"/> \$5,000 to \$9,999 |
| <input type="radio"/> \$1 to \$499 | <input type="radio"/> \$10,000 to \$19,999 |
| <input type="radio"/> \$500 to \$999 | <input type="radio"/> \$20,000 to \$39,999 |
| <input type="radio"/> \$1,000 to \$1,999 | <input type="radio"/> \$40,000 or more |
| <input type="radio"/> \$2,000 to \$4,999 | |

What was the approximate amount charged to the client for your DISBURSEMENTS only:

- \$0
- \$1 to \$49
- \$50 to \$99
- \$100 to \$199
- \$200 to \$499
- \$500 to \$999
- \$1,000 or more

How did you calculate the fee charged for your PROFESSIONAL SERVICES?

- Billed by the hour
- Charged a flat rate
- Other (please specify)

Was the fee charged for your PROFESSIONAL SERVICES what you would charge for those services in files not limited in scope?

- Yes, it was the same or close to the same as I would normally charge
- No, it was higher than usual
- No, it was lower than usual

What is your best guess of the amount you would have charged this client if you had handled their entire legal matter rather than the limited services you provided.

Approximately how many days passed between the date the file was opened and the date work for client was substantially finished?

- 1 business day / same day
- 2 to 5 business days
- 6 to 10 days
- 11 to 15 days
- 16 to 25 days
- 26 to 35 days
- 36 or more business days



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Limited Legal Services Project - Lawyers' Survey

Views on the services you provided:

Please indicate the extent to which you agree with the following statements.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I enjoyed the work I performed for the client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work I performed for the client was more enjoyable than my usual work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work I performed for the client was easier than my usual work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work I performed for the client was cost-effective for the client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The work I performed for the client was more profitable than my usual work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The client appeared satisfied with the work I performed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am satisfied with providing legal services on a limited scope basis	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I will offer to provide limited scope services to other clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Thank you for your time.



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Limited Legal Services Project - Mid-project Lawyers' Survey

Thank you for your participation as a lawyer with the Alberta Limited Legal Services Project. As you know, the Canadian Research Institute for Law and the Family is currently conducting an evaluation of the Project.

As we have now reached the mid-point of our evaluation, we are requesting your assistance in completing a survey regarding your experiences and satisfaction with providing limited scope legal services to clients in Alberta. Please answer the survey considering ALL limited scope work you have completed since 1 April 2017, whether that file came to you through the project or not.

Your responses to this survey are anonymous and you are free to omit any questions that you would prefer not to answer. All data are stored securely and confidentially by the Institute, and will only be expressed in aggregate format.

About you:

What is your age?

- | | |
|------------------------------------------|-----------------------------------------|
| <input type="radio"/> Less than 25 years | <input type="radio"/> 55 to 64 years |
| <input type="radio"/> 25 to 34 years | <input type="radio"/> 65 to 74 years |
| <input type="radio"/> 35 to 44 years | <input type="radio"/> 75 years or more |
| <input type="radio"/> 45 to 54 years | <input type="radio"/> Prefer not to say |

What is your gender?

- Male Female Other Prefer not to say

What is the primary location of your practice?

- Online / by telephone
- Office in Calgary or surrounding area
- Office in Edmonton or surrounding area
- Office in Lethbridge or Red Deer (including Sylvan Lake)
- Office in Medicine Hat, Wood Buffalo or Grand Prairie
- Office in Okotoks or Brooks
- Office elsewhere in Alberta

What was the year of your first call to the bar in Alberta?

How many lawyers are in your firm?

- Just me
- 2 to 3 lawyers, including me
- 4 to 6 lawyers
- 7 to 10 lawyers
- 11 to 15 lawyers
- 16 to 25 lawyers
- More than 25 lawyers



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Limited Legal Services Project - Mid-project Lawyers' Survey

About your practice...

In which areas of law do you provide services? (please check all that apply)

- | | |
|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <input type="checkbox"/> administrative law | <input type="checkbox"/> employment law |
| <input type="checkbox"/> adoption | <input type="checkbox"/> estate planning, trusts, wills and estates law |
| <input type="checkbox"/> adult guardianship and trusteeship | <input type="checkbox"/> family law, divorce law |
| <input type="checkbox"/> business law, commercial leases | <input type="checkbox"/> human rights |
| <input type="checkbox"/> child protection | <input type="checkbox"/> immigration and refugee law |
| <input type="checkbox"/> child specialist | <input type="checkbox"/> insolvency, bankruptcy and foreclosure law |
| <input type="checkbox"/> civil litigation | <input type="checkbox"/> legal research/writing, legal opinions |
| <input type="checkbox"/> corporate/commercial, shareholders disputes, directors liability | <input type="checkbox"/> personal injury law |
| <input type="checkbox"/> criminal law | <input type="checkbox"/> residential tenancy |
| <input type="checkbox"/> debtor and creditor law | <input type="checkbox"/> small claims |
| <input type="checkbox"/> Other (please specify) | |

Which of the following legal services do you provide: (please check all that apply)

	In your regular practice	As part of your limited scope practice
coaching for trial court appearances	<input type="checkbox"/>	<input type="checkbox"/>
coaching for appeals	<input type="checkbox"/>	<input type="checkbox"/>
coaching for negotiation, mediation or arbitration	<input type="checkbox"/>	<input type="checkbox"/>

	In your regular practice	As part of your limited scope practice
coaching for questionings	<input type="checkbox"/>	<input type="checkbox"/>
coaching for disclosure and discovery process	<input type="checkbox"/>	<input type="checkbox"/>
coaching on filing and service processes	<input type="checkbox"/>	<input type="checkbox"/>
drafting pleadings and other trial court documents	<input type="checkbox"/>	<input type="checkbox"/>
drafting appeal documents	<input type="checkbox"/>	<input type="checkbox"/>
drafting demand letters	<input type="checkbox"/>	<input type="checkbox"/>
drafting orders	<input type="checkbox"/>	<input type="checkbox"/>
drafting settlements and agreements	<input type="checkbox"/>	<input type="checkbox"/>
drafting wills, powers of attorney and personal directives	<input type="checkbox"/>	<input type="checkbox"/>
reviewing pleadings and other trial court documents	<input type="checkbox"/>	<input type="checkbox"/>
reviewing demand letters	<input type="checkbox"/>	<input type="checkbox"/>
reviewing orders	<input type="checkbox"/>	<input type="checkbox"/>
reviewing settlements and agreements	<input type="checkbox"/>	<input type="checkbox"/>
reviewing financial disclosure made or received	<input type="checkbox"/>	<input type="checkbox"/>
filing pleadings and other court documents	<input type="checkbox"/>	<input type="checkbox"/>
entering orders	<input type="checkbox"/>	<input type="checkbox"/>
initial consultation	<input type="checkbox"/>	<input type="checkbox"/>
follow-up consultation	<input type="checkbox"/>	<input type="checkbox"/>
independent legal advice on agreements	<input type="checkbox"/>	<input type="checkbox"/>
legal research	<input type="checkbox"/>	<input type="checkbox"/>
legal opinion	<input type="checkbox"/>	<input type="checkbox"/>

	In your regular practice	As part of your limited scope practice
appearing before Provincial Court, application	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Provincial Court, trial	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Provincial Court, other purpose	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Queen's Bench, application	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Queen's Bench, trial	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Queen's Bench, other purpose	<input type="checkbox"/>	<input type="checkbox"/>
appearing before Court of Appeal	<input type="checkbox"/>	<input type="checkbox"/>
appearing before tribunal	<input type="checkbox"/>	<input type="checkbox"/>
appearing at questionings	<input type="checkbox"/>	<input type="checkbox"/>
appearing at negotiation, mediation or arbitration	<input type="checkbox"/>	<input type="checkbox"/>
conducting negotiations	<input type="checkbox"/>	<input type="checkbox"/>
conducting mediation	<input type="checkbox"/>	<input type="checkbox"/>
conducting arbitration	<input type="checkbox"/>	<input type="checkbox"/>
enforcing judgments	<input type="checkbox"/>	<input type="checkbox"/>
enforcing agreements	<input type="checkbox"/>	<input type="checkbox"/>
calculating child support or spousal support	<input type="checkbox"/>	<input type="checkbox"/>
calculating division of property	<input type="checkbox"/>	<input type="checkbox"/>
calculating income	<input type="checkbox"/>	<input type="checkbox"/>



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Limited Legal Services Project - Mid-project Lawyers' Survey

About your limited scope work...

Why did you join the roster for the Alberta Limited Legal Services Project? (please check all that apply)

- | | |
|-----------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <input type="checkbox"/> To help make legal services more affordable | <input type="checkbox"/> To gain access to a new market of clients |
| <input type="checkbox"/> To improve access to justice for Albertans | <input type="checkbox"/> To have an improved lifestyle and/or more job satisfaction |
| <input type="checkbox"/> To enhance my existing practice | <input type="checkbox"/> To increase or stabilize revenue for my practice |
| <input type="checkbox"/> To help build a new business model for my practice | <input type="checkbox"/> To experiment with different practice models |
| <input type="checkbox"/> Other (please specify) | |

Approximately how many potential clients have contacted you about providing limited scope services?

Approximately how many limited scope files have you taken on since joining the project?

In a typical 4-month period, approximately how many limited scope files do you take on?

To what extent do you agree that the limited scope services you provide increase your clients' ability to access justice?

- Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

To what extent do you agree that your limited scope work increases your clients' capacity to deal with their current legal issue?

Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

To what extent do you agree that your limited scope work increases your clients' capacity to deal with future legal issues?

Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

Did you think that your limited scope work is:

- more profitable than your full retainer work?
- equally profitable as your full retainer work?
- less profitable than your full retainer work?

At any point since joining the limited scope services project, have you self-reported any files to your insurer or the Law Society?

Yes No

At any point since joining the limited scope services project, have any formal complaints been made about files you have handled on a limited scope basis?

Yes No

To what extent do you agree that the following are benefits of providing limited scope legal services?

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Improving availability of affordable legal services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price predictability for clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving outcomes for clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhancing clients' empowerment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving confidence for clients in the process and outcome	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving access to settlement processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to tailored services for clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Contributing to access to justice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to new, untapped markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using new business models	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving your lifestyle and job satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self-represented litigants who have had access to limited scope services are better prepared and familiar with court rules and procedures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Forms, pleadings and documents are clearer for clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hearings with self-represented litigants are shorter and more focused	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The number of hearings with self-represented litigants is reduced	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outcomes for self-represented litigants are more just	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Justice resources are freed up for other matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public perception of the justice system is improved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public perception of lawyers is improved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

To what extent are you satisfied with the following aspects of the website for the Alberta Limited Scope Retainer Project and the roster of participating lawyers contained on the website?

	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Don't know
The resources offered to clients as part of the website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How easy it is for your clients to navigate the website once they find it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The layout, design and functionality of the website, including your profile	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The exposure the website gives you/your firm to clients looking for limited scope legal services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How easy it is for your clients to find the website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The number of clients who have found you using the website to date	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you said "Dissatisfied" or "Very dissatisfied" to any of the above, please explain.

How likely are you to continue to offer limited scope services when the project finishes at the end of August?

Very likely Somewhat likely I'm not sure Somewhat unlikely Very unlikely

Would you be interested in collaborating with other lawyers to maintain the website independent of the project and offer professional education on providing limited scope services in the future?

Yes No

If you answered "Somewhat unlikely" or "Very unlikely," please explain.

Thank you very much for taking the time to complete this survey!