PLANNING GUIDE TO STARTING A BAR-SPONSORED PRACTICE MANAGEMENT ASSISTANCE PROGRAM
Second Edition

A Service of the ABA Law Practice Management Section
Practice Management Advisors Committee

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Foreword

This Planning Guide has been prepared by the members of the Practice Management Advisor's Committee of the Law Practice Management Section of the American Bar Association (ABA LPM.) The Committee is comprised of individuals who are engaged or employed by state and local bar associations or law societies to help lawyers to manage their practices more effectively. Although the exact role of practice management advisors differs from state to state, all the advisors are committed to the process of increasing the quality of legal services by helping lawyers and law firms manage their offices better. The concept of an organization of bar-sponsored practice management advisors has proven to be of immense value to those who serve in those roles. The purpose of this Guide is to provide an outline for bar associations considering the implementation of a practice management advisor program. Bar association leaders who contemplate initiating such a visionary program should take comfort from the fact that an organization like the ABA LPM Section Practice Managers Advisors Committee exists to assist those starting new practice management advisory programs. T he Committee owes a debt of gratitude to those were crucial in establishing both the Committee and the first version of the Planning Guide. Nancy Byerly Jones served as the Practice Management Advisors Task Force Chair from 1995-99 and without her efforts, it is doubtful that we would now have a formal PMA group. Former LPM Section chair Donna Killoughey will always be credited for her initiative and vision in embarking on the journey to promote these resources for lawyers. Former LPM Section chair Gary Munneke assisted us with maintaining momentum during difficult times. The current leadership of the ABA LPM Section continues to be supportive of our efforts.

We appreciate all of those whose previous efforts have given vitality, ideas and energy to the practice management advisors. While we thank them here, we truly hope to repay them by assisting other bar associations in establishing these innovative and beneficial programs to assist their members.

Although practice management advisors serve the needs of lawyers who work in all practice settings and work with lawyers in large and small firms alike, many practice management advisors provide special assistance to solo practitioners and small firm lawyers. In fact, most lawyers in the United States practice in law firms of five lawyers or less. The largest single group of legal practitioners is made up of solos. There the same lawyers who own the practice and are responsible for managing

it are also responsible for delivering the legal work product to clients. Thus, there is constant tension between running the office and providing legal services.

Another problem that faces lawyers as managers is that law school does not prepare them for the demands of running a practice. Legal education may teach an individual how to analyze legal issues, but it provides limited opportunities to teach graduates the practical skills that they will need to utilize in providing client services and operating the business side of a law practice.

Larger law firms can hire administrative employees and outside management consultants to free up their lawyers to concentrate more on the delivery of legal services. Solos and small firms share the same objectives to assure quality services and to operate efficiently, but they often lack the resources to dedicate personnel or hire outside assistance to help them do a better job.

The result of management problems in law firms, whatever size, is an increase in the probability of professional error. Whether mistakes produce grievances against the lawyers who made them, malpractice actions by clients harmed by the lawyer's conduct, or simply ill-will from dissatisfied former clients, the cost of professional error can be staggering. The local availability of practice management advisors can therefore improve the reputations of lawyers and bar associations as well as promoting providing better services to lawyers' clients.

The practice management advisors are dedicated to helping lawyers help themselves, sometimes by providing resource material, sometimes by offering educational programs, and sometimes by conducting in-office management audits. In some jurisdictions, the practice management advisor's function may be tied to the grievance process or an impairment assistance program. In many jurisdictions, the practice management advisor works closely with a law practice management section or committee. In all jurisdictions where practice management advisors are employed, the demand for their services has been remarkable.

This guide is intended to help all bar associations to provide practice management assistance. For those states that have no program at all, the guide will provide ideas on how to implement a program. For bar associations that may have a program in place, this guide offers many new ideas on how to enhance the services offered to its lawyers. Members of the Committee stand ready to provide assistance to other bar associations to help them create a practice management advisor office. For more

information on how to contact one of the practice management advisors directly, see Appendix 7.

The ABA LPM Section is dedicated to educating lawyers on a variety of subjects related to the management of their practices in order to help them to excel in a competitive marketplace. The Section has provided the funding necessary to support the work of the Practice Management Advisors Committee that led to the development of this guide. Through its magazine, *Law Practice Management*, an extensive array of books and newsletters, and a diverse continuing legal education offering, the ABA LPM Section seeks to work in partnership with state and local bar associations to help improve the practice of law and professionalism.

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Chapter I. Introduction

A. Overview

This Planning Guide, Second Edition for developing practice management assistance programs (PMAPs or Programs) is sponsored by the American Bar Association's Center for Professional Responsibility and the Law Practice Management Section (LPM Section), and was produced by the LPM Section's Practice Management Advisors' Committee. The Planning Guide, Second Edition will be useful at several stages in the development of a PMAP. It provides general information to those exploring the concept of practice management assistance; program specifics for those who are in the process of developing or proposing a program; and practical advice and information to personnel involved in the establishment and operation of a PMAP.

This Planning Guide draws on the experience of currently operating American state bar and Canadian law society practice management advisory services. Demand for practice management assistance is ever increasing, as is the demand for information from entities desiring to establish advisory services programs. Bar associations throughout the country are exploring how they can provide expanded services to their members. The tremendous demand upon existing PMAPs from lawyers within their jurisdictions demonstrates that these are programs that lawyers respond to and appreciate. Accordingly, many jurisdictions are exploring the establishment of either a PMAP or offering Programs in this area.

As the term is used in this Planning Guide, a PMAP is a not-for-profit program to which specific resources (full or part-time, employees or consultants) have been allocated over a period of time to provide free or low-cost practice management assistance to lawyers, and is sponsored by a state, county or local bar association in the United States or a law society in Canada. On the other hand, a Program may be the offering of periodic or sporadic presentations on practice management topics, whether by an outside consultant or by one or more members of a bar association or law society. PMAPs provide on-going assistance in many areas while Programs provide assistance and advice on targeted topics. Existing advisors believe that PMAPs are of great value and this Guide focuses on them. However, all advisors support any efforts by bar associations or law societies to meet lawyers' needs for management information, even if limited.

The evolution of PMAPs has occurred in response to growing evidence that:

- Many, and perhaps most, complaints to discipline authorities and malpractice claims against lawyers are caused, at least in part, by poor practice management;
- improving practice management skills can play an important role in reducing the number and dollar value of malpractice claims and improving the public perception of lawyers;
- professionalism, sound management and effective leadership are inherently intertwined and dependent one upon the other; and

- solo and small firm practitioners are not receiving necessary assistance with law office management and technology issues within the existing law school and CLE framework.

The teaching of practice management skills to lawyers has been haphazard over the years because most law schools have not and do not consider it part of their mandate to educate their students in these matters and no other effective teaching forum exists. Some bar associations have responded to their members' needs for help in these areas by adopting a systematic approach now known as PMAPs.

Existing PMAPs share these common objectives:

1) assisting lawyers in improving efficiency and effectiveness in the delivery of legal services;
2) assisting lawyers in implementing systems and controls to reduce risk and improve quality in the delivery of legal services;
3) assisting lawyers in client relations; and
4) assisting lawyers and their office personnel in using emerging technologies to improve the delivery of legal services.

These objectives, when met, enhance professionalism and competency.

Although most PMAPs offer assistance to all lawyers licensed in their jurisdiction, lawyers engaged in private practice, particularly as sole practitioners or in small firm practices, most frequently use the programs in existence.

B. History

The first PMAPs were established in the early 1980s by the State Bar in Florida and by the Law Societies in Alberta, British Columbia and Ontario. The Oregon State Bar, also a pioneer, provides PMAP services through its mandatory Professional Liability Fund. Arizona, Maryland, and New York State established programs in the early 1990s, and the initiation of programs then escalated in the mid-1990s.

As recognition of the importance of these programs surged, the American Bar Association's Law Practice Management Section ("LPM Section") in 1994 asked Nancy Byerly Jones, founding director and management counsel of North Carolina's Lawyers Management Assistance Program ("LMAP"), to chair a Task Force of Practice Management Advisors to create, among other things, this Planning Guide. The Task Force became a Committee of the ABA's LPM Section and it meets two or three times a year to share ideas and resources. The ABA's Center for Professional Responsibility manages a listserv, or forum for the exchange of information among the group via Internet e-mail, for the use of practice management advisors throughout North America. As bar associations assign people to develop PMAPs or Programs, these staff members are invited to join the PMA e-mailing list. The Committee also works with bar associations or law societies to assist them in establishing PMAPs.

The following PMAPs participated in drafting this Planning Guide, Second Edition:

United States	**Canada**
Alabama	Alberta
Allegheny County, PA	British Columbia
Arizona	Ontario
Colorado	
District of Columbia	
Florida	
Georgia	
Maryland	
New York (City and State)	
Oklahoma	
Oregon	
Pennsylvania	
South Carolina	
Tennessee	
Texas	

The National Association of Bar Executives ("NABE") has also created a forum for practice

management advisors, and other bar executives interested in programs and activities targeting practice management initiatives. Pat Yevics, PMA of the Maryland State Bar Association, chairs this NABE forum as of November 2000. She can be reached at pyevics@msba.org.

Each existing PMAP evolved from and operates under unique circumstances. Although there are many similarities among the services offered by PMAPs, the reason for creating each PMAP directs the scope and nature of the services each PMAP offers. These services range from educational programming to individual consulting, including services that are heavily tied to lawyer disciplinary entities. There is no "model" that can be abstracted. For that reason, we have styled this publication as a Planning Guide, with the expectation that sponsoring entities will use the information contained in the Guide to develop a program tailored to their particular needs and circumstances.

Chapter II: Initial Considerations

A. Why Establish a PMAP?

A number of state bar associations are establishing committees and issuing reports promoting practice management services. Several American Bar Association and other legal publications have in recent years recommended establishment of PMAPs. Among these:

* *The Success of All Lawyers is Tied to Managerial Abilities,* by Gary A. Muneke, The National Law Journal, August 3, 1998
* *Lawyer Regulation for a New Century, Report of the Commission on Evaluation of Disciplinary Enforcement*, American Bar Association Center for Professional Responsibility, 1992
* *Legal Education and Professional Development - An Education Continuum Report of the Task Force on Law Schools and the Profession: Narrowing the Gap*
  American Bar Association Section of Legal Education and Admissions to the Bar
  July 1992
* *The Report of At The Breaking Point, A National Conference on the Emerging Crisis in the Quality of Lawyers' Health and Lives - Its Impact on Law Firms and Client Services,* American Bar Association, 1991
* *Assisting Members in Practice Management and Development,* by Bart Mendenhall, Colorado Lawyer, November 1999.
* Hurlburt, W.H., Ed. "The Legal Profession and Quality of Service: Further Report and Proposals: Report and Materials of a National Workshop on Quality of Legal Services" held in Toronto in October, 1980, as a sequel to the National Conference on Quality of Legal Services held in Ottawa in October, 1978.
  Federation of Law Societies of Canada, 1981.
* Hurlburt, W.H., Ed. "The Legal Profession and Quality of Service: Report and Materials of the Conference on Quality of Legal Services," Ottawa, Ontario, October 26 - 28, 1978. Canadian Institute for the Administration of Justice, 1979.

PMAPs offer the sponsoring organizations and their members an affordable way to obtain answers to questions about practice management and basic office systems. This is particularly important for sole practitioners and small firm members who may not be able to afford these services if they are not offered through the bar association or law society. Practice management advisors in existing programs verify that practice management assistance needs range from the most basic inquiry (such as "Why do I need a conflict checking system?") to complex and sophisticated management advice.

B. Differing Origins: Examples of Existing PMAPs

As of the date of this Planning Guide, Second Edition, there are 20 PMAPs. Most existing PMAPs have focused on practice management from the outset, although others have evolved from services with a broader focus. Existing PMAPs developed to meet varying needs and have evolved in different ways, creating great diversity in the scope and delivery of services. While the following list is not exhaustive, it shows the broad range of services offered throughout North America as of November 2000.

The Florida Bar program was created to provide its members with low or no-cost law office management consultation. The program through the years expanded from its primary function as an on-site consulting service to a broad-based information clearinghouse and referral service. Personnel respond to requests for information, analyze and evaluate software packages, write news articles, and speak on management topics. Telephone inquiries to the program have increased, resulting in staff spending the largest portion of time in telephone consultations.

The New York State Bar Association's program, and the program recently created by the Association of the Bar of the City of New York, are designed as resource centers to assist members improve office procedures, monitor and evaluate developments in law office economics and management, disseminate information and promote the availability of law practice management education programs, promote risk management practices within law firms, and provide direct guidance to members on issues in which literature or educational materials are nonexistent or inadequate.

The Maryland State Bar Association program was created specifically to assist and educate lawyers in solo and small firms throughout the state in improving the efficiency of their practice management standards related to personnel, client service, accounting, and risk management. It also was designed to assist these practitioners with all types of technology issues. The program provides low cost, conveniently located educational programs on law office management, risk management, and technology issues. In addition, it provides telephone consultations on a variety of issues. The program also works with new bar admittees and the Professional Committee, and puts on programs on how to start a solo practice.

The Arizona program, in addition to providing management consultations to lawyers at their request, provides an alternative to traditional disciplinary proceedings for minor ethical misconduct. Although it operates independently of the State Bar of Arizona's Discipline Department, much of its resources are focused on discipline-referred matters.

The Oregon program is a unique program in the United States because the Oregoon State Bar Professional Liability Fund, a compulsory state malpractice carrier, operates it. Services are free and confidential. The program is designed to improve the quality of practice management,

thereby reducing legal malpractice claims. The program provides practice management assistance to all lawyers in private practice. Most of the lawyers using the program have independently requested assistance. A small percentage has requested assistance in connection with their disciplinary proceedings.

The Ontario Service is part of the regulatory and disciplinary body for all Ontario lawyers (The Law Society of Upper Canada). It originated in 1981 with a loss prevention focus, emphasizing and working with other lawyers' organizations, in particular the voluntary bar association. From this practice management focus, it has developed into a telephone hotline, providing immediate assistance and advice to lawyers on a wide variety of subjects related to the practice of law. The law practice management focus has tended to move to the background and, where it is delivered, it is in the form of workshops rather than individual assistance. The current focus is on ethical questions rather than practice management. The Service remains confidential from other programs of the Law Society.

C. Confidentiality and Duty to Report Ethical Violations

Two major issues in the design of a PMAP are whether the service is confidential and under what circumstances, PMAP personnel have a duty to report perceived ethical violations. All existing programs offer confidential services, limited only by any reporting requirements. In some PMAPs, exemption from a reporting duty is viewed as the bedrock of the program's effectiveness.

Some programs have passed or are considering rules exempting personnel of the PMAP from the normal reporting responsibilities of lawyers and employees of the law society or state bar association. For example, Oregon has specific disciplinary rules that exempt the program from reporting responsibilities.

Other PMAPs are closely tied to the discipline process, which has an impact on the decision regarding reporting duty. In Arizona, for example, where the PMAP offers a diversion program for lawyers with minor discipline complaints, reporting serious ethical misconduct to discipline authorities is viewed as an essential extension of the primary mission of lawyer discipline in that state, protection of the public.

In Alberta, Canada, the service is confidential, but referrals from the Conduct Committee and the Conduct Review Committee are, with the members' consent, subject to a waiver of confidentiality sufficient to allow reporting to the referring committee on the matters that prompted the referral. The rule in the District of Columbia is similar.

Decisions concerning confidentiality and relationship to discipline may dictate other decisions outlined in this Planning Guide, such as the credentials of staff, allocation of time and resources and whether or not on-site services are offered.

See Appendix 1 - Samples of Confidentiality Provisions

Another issue to consider in the formation of a PMAP is the availability and limitations of insurance coverage for staff and volunteers participating in the program. Some policies cover paid staff members but do not cover volunteers. PMAPs that have a close relationship to the disciplinary system may have special liability problems. It should be determined if they are included in any immunity that is provided to bar counsel and their staff.

D. Leadership Support

If the sponsoring entity wants to establish or at least consider the benefits of creating a PMAP, a special task force or a committee must be given the task of reviewing the issues associated with creating a PMAP and making a recommendation about the creation of a PMAP to the sponsoring entity's governing counsel. If the recommendation is to create a PMAP and the sponsoring entity approves, then

experience has shown that strong leadership, flexibility and creativity are needed to assure that resources are appropriately allocated. As discussed in more detail below, this task force or committee should establish the PMAP's goal and an initial working budget. The director of the PMAP should be left to determine how the goal should be achieved. Some existing PMAPs share responsibilities with other departments or programs, adding to the resources available to their sponsoring entities to serve and provide benefits to their members. Some share joint responsibility for web-based services including content, publications, and the management of both mailing lists and electronic forums. Others work with CLE committees to develop practice management and technology based programs.

Chapter III. Services and Resource Allocation

As with any new program, it is critical that the goal or mission of the program is articulated. This provides the backbone for selecting the services to be provided and the personnel to perform the services. Goals and practical objectives, like the methods of achieving them, vary greatly among existing PMAPs and must be tailored to the needs and circumstances of the particular jurisdiction.

The amount of time spent by existing PMAPs on matters referred from discipline varies from none to more than 75 percent. Discipline-referred matters are generally governed by deadlines imposed by the court or disciplinary entity; this may have an impact on the ability to develop and provide other types of practice management services.

The following list is intended only to provide an overview of selected goals adopted by jurisdictions that have developed PMAPs. It is, of course, not all-inclusive, but it may be helpful in targeting a sponsoring entity's own mission.

* Increasing the competence of the profession
* Increasing practice management skills
* Improving service to clients
* Protecting the public
* Improving the public image of the legal profession
* Increasing the value of bar membership
* Reducing the potential for legal malpractice liability
* Reducing discipline complaints
* Providing alternatives to disciplinary proceedings for minor ethics violations
* Reducing lawyers' stress and improving their quality of life

See Appendix 2 - Mission Statements of Certain Existing Programs

A. Defining Scope of Services

All bar associations and law societies, whether voluntary or unified, are seeking ways to improve service to their members, and PMAPs may be regarded as a means to provide unique services. No programs have the resources to provide all the services and products that might be valuable to lawyers in their jurisdiction.

It is important to define the program's scope and limitations so potential users know what they can expect from the PMAP. Arizona, for example, uses a disclaimer form (which is included in Appendix 1) to inform program users that ethics and legal advice are not included in the program's services.

The size of a sponsoring entity's membership and their geographical distribution is an important consideration in determining services to be offered by PMAPs. Those charged with developing PMAPs should be aware, both at the outset and throughout the evolution of such programs, of the danger of overextending their programs and personnel. Services undertaken or products created without adequate financial, technological or human resources may be disappointing to members anticipating these services. On the other hand, such considerations should not be used as justification for doing nothing. Even a Program offering limited services is valuable. However, the success of a Program is not a fair indicator of the potential success of a PMAP. This is due to the lack of continuity and availability of assistance to members.

B. Potential Services

Once goals for the PMAP have been developed, the next step is to determine the strategy for accomplishing them -- that is, identifying the services that the PMAP will provide. There are some notable differences among existing programs in the method by which services are delivered, as well as in the services themselves. Several PMAPs conduct on-site consultations, while some provide management information only by telephone. Others serve as a clearinghouse for information and/or develop legal education programs. A number of programs assist lawyers in setting up a new law practice or closing a practice and in learning about technology. Some PMAPs are designed specifically to serve sole and small firm practitioners.

A PMAP may include any combination of services and may change its offerings based on demand, experience, shared responsibilities in other bar services, changes in resources or changes in availability of management expertise. A sampling of services that are provided by existing PMAPs follows:

* Telephone advice and information on practice management issues.
* Consulting services, provided either by telephone or on-site, on topics including
* calendaring
* conflict-of-interest systems
* mail handling
* time and billing issues and systems
* trust accounting
* general accounting
* financial management
* client communication
* computer consultation and assistance with software selection
* computer software demonstrations/discussions
* computer and software training
* filing systems and file management
* client relations issues

* closure of impaired or deceased lawyers' law practices
* career transition counseling (to handle questions such as "Should I start my own law firm?," "What
* practice direction, specialization and business focus counseling
* strategic planning counseling
* compensation issues
* time management issues
* marketing advice
* facilitating resolution of partnership or inter-lawyer disputes or personnel issues
* practice management assistance and/or monitoring for lawyers referred for alternatives to disciplinary proceedings
* practice management assistance to lawyers participating in programs serving impaired lawyers
* assistance to law schools in establishing a practice management educational component to their curricula
* information on buying and selling a practice and practice valuation (in states in which this is permittec
* assistance to lawyers in developing Internet home pages
* self-audit materials and/or training
* Clearinghouse/resource bank of information, including practice aids, handbooks and educational materials
* technology issues
* software selection/utilization
* how to set up a practice
* how to close a practice
* supervising employees
* law firm break-ups
* issues regarding sharing of space
* of-counsel arrangements
* malpractice prevention
* selection criteria and availability of malpractice insurance
* local resources and services, including assistance to impaired lawyers
* alternative career and transition issues
* management information via the Internet, bulletin boards or e-mail services
* demonstration disks and sample software programs
* practice aids, handbooks and educational materials
* lending or reference library of audio- and videotapes and books
* videotaped presentations on practice management
* Presentations and educational programs
* small group workshops on practice management
* in-person presentations on practice management at bar association or other lawyer meetir
* technology training for lawyer and/or support staff

* educational programs for solo and small firm practitioners and legal support personnel
* seminars to law students and newly admitted lawyers
* publication of articles on technology and law office management in bar publication and on bar websites
* assistance with and/or management of electronic discussion groups for bar members on issues related to law office management and technology
* sponsorship or development of technology trade shows
* course instruction to lawyers in lieu of formal disciplinary sanctions in appropriate cases (known in some jurisdictions as "ethics school")

C. Disciplinary and Lawyer Assistance Programs

Currently, there are two basic categories of PMAPs. One group is involved in the disciplinary issues associated with lawyers in their state and the other group is outside of that area and is not involved, even on a voluntary basis, with disciplinary issues. Similarly, some PMAPs include a Lawyers Assistance Program as part of their services or work in conjunciton with separate lawyer assistance programs within their bars, addressing the various issues that affect an attorney's ability to practice. All sponsoring entities must determine whether its PMAP may, or should, assist with the closing of a member's practice as the result of unexpected death or disability. This is always a difficult issue to handle, particularly in light of the attorney-client privilege.

D. Resources Available to the New PMAP

All sponsoring entities should take heart that neither they nor the PMA selected need to operate in a vacuum. Once the staff (either employees, consultants, or a combination of both) has been selected, the first step is to consider joining the ABA, its LPM Section and the PMA Committee, and the NABE. The new PMA should review this Guide and contact one of the current PMAs to be included on the listserv with the other PMAs. All of the existing PMAs are willing to assist a new PMA. Any budget should include the travel expenses to attend the LPM Section's two meetings each year and/or NABE meetings where PMAs gather to share information and support each other. Several PMA's also attend the ABA TECHSHOW held each spring and have enrolled their bar associations as TECHSHOW program partners.

E. Considerations Regarding On-Site Consultations

Budget, disciplinary responsibilities, geography and demography will be factors a PMAP must consider in determining whether to provide on-site services. There are specific benefits to providing on-site services, such as the ability to make a hands-on evaluation of systems in place and the ability to develop procedures tailored to the lawyer's own needs. PMAs who provide on-site assistance believe that

meeting members in their office setting increases the probability that recommended changes, custom-designed for the specific practice, will be implemented. PMAs, who conduct on-site services, report high levels of satisfaction from the lawyers and their staff, who appreciate the in-depth services.

Although on-site consultations have proven in some programs to be an effective way to assist members, the number of PMAs on staff limits the number of on-site visits. On-site consultations require a large investment of time, so the number of consultations that can be accomplished is limited. A program that offers on-site consultations may need to limit the range of other resources and services offered, or may need to increase staff to accommodate a broader range of services.

Several factors should be given particular attention by PMAPs considering on-site consultations. These factors are important in selecting personnel who will provide these in-person consultations.

* Interpersonal and communication skills of the consultant providing on-site services, including tact, calm, ability to communicate in a non-threatening way, and consideration of others' sensitivities
* Ability to address a wide range of issues on the spot (often without ready access to the full range of resource materials available at the office)
* Practical realities of extensive travel
* Transportation concerns, including rapid depreciation of a personal vehicle, increased maintenance needs due to high mileage, and the necessity to carry business insurance on private vehicles
* Provision by the sponsoring entity of vehicle or reimbursement for mileage
* Importance of follow-up visits
* Lack of or limited services to lawyers by telephone while the provider is away from the office (particularly acute in programs which have little or no support staff)
* Need for additional office equipment for travel (See Chapter V)
* Impact of travel time on program workload

Some existing PMAPs have established schedules of sliding-scale fees for consultations that are based on the number of lawyers in the firm, the number of years the lawyer has been in practice, the length of the consultation, the need for issuance of a written report, or other factors. Those that offer services both on a self-referred basis and on referral from a disciplinary body may charge different fees for these two categories.

F. Existing Programs' Allocation of Services

Just as the range of services varies dramatically among existing programs, the allocation of time and resources among PMAPs that offer similar services also differs greatly. There is no "model" amount of time to spend on various services; however, the chart in Appendix 3 may be helpful for planning purposes. Similarly, sample budgets for the initial 12 months of operation have also been included in Appendix 4.

See Appendix 3 - Chart of Services Provided by Certain Existing Programs
See Appendix 4 – Sample of Initial PMAP Budgets

G. Basic PMAP Resource Needs

While the range of service provided by PMAPs varies, the initial needs of a basic PMAP are rather predictable. Some basic items have been routinely included as must-have resources. Outlined below is a generalized list of these resources.

- Books*
  - *How to Start and Build a Law Practice*
  - *Easy Self-Audits for the Busy Law Office*
  - *The Business of Law*
  - *The Complete Guide to Marketing Your Law Practice*
  - *Flying Solo*
  - *Law Office Policy and Procedures Manual*
  - *Law Office Staff Manual for Solos and Small Law Firms*
  - *Legal Fees and Representation Agreements*
  - *Practical Systems: Tips for Organizing Your Law Office*
  - *Getting Started: Basics for a Successful Law Firm*
  - *Strengthening Your Firm: Strategies for Success*

* All of these books are available through the ABA Law Practice Management Section's publication department.

- Legal Software Products
  - *Case Management*
    - Amicus Attorney
    - TimeMatters
    - ABACUS
  - *Time and Billing/Accounting*

Timeslips
PCLaw
QuickBooks
Quicken

Litigation Support

Summation
CaseMap
TimeMap

Document Management

Worldox
IManage

Document Assembly

HotDocs

In addition to resource books and software, several PMAPs have developed guides for starting law offices. To accomplish this, a basic PMAP will need to first determine a media format for distributing this "guide" or "startup kit." Existing PMAPs use spiral bound notebooks, velo bound booklets, and electronic formats for their guides. Other formats may include videotape, audiotape, or CD formats.

After a format media is chosen, the PMAP will then begin to select information to include in the guide specific to the jurisdiction. Areas generally covered in startup guides include:

- Business Plan Development
- Choice of Entity Considerations
- Office Space and Location
- Office Equipment Needs
- Technology Needs – Hardware, Software, and Peripherals
- Staffing
- Marketing and Advertising
- Financial Management
- Trust Accounting
- Malpractice Prevention
- Ethics

Chapter IV. PMAP Staffing

Paid professional and clerical personnel generally support existing PMAPs, although volunteers or outside consultants may be used to supplement the staff or lend particular expertise.

As discussed previously in this Guide, the first step in determining appropriate staffing for a program is to establish the purpose and practical goals of the PMAP. The skills, experience and training needed to accomplish the program's objectives should be delineated in job descriptions and can be used in recruiting and selecting staff members. Selecting a director and staff without first defining the "mission" of the program or the activities in which they will engage is likely to be frustrating and difficult for the program and its personnel.

Among the considerations in developing a job description should be whether on-site consultations, telephone consultations or both will be provided through the PMAP, the scope of technology consulting, whether discipline-referred matters will be handled, and whether the PMAP will offer ethics advice to program participants. Some programs may require a lawyer as the program director; others may require a person with extensive experience in technology, financial management, law firm administration, or basic office systems. PMAPs that provide on-site services, particularly those that serve a large geographical area, need to recruit individuals who are willing and able to travel extensively.

There are common elements among directors and staff of existing programs. They include: training and/or experience in law office management and technology: excellent oral and written communication skills; ability to maintain confidentiality; flexibility; aptitude for innovation; strong interpersonal, analytical and evaluative skills; marketing abilities, and broad understanding of the sponsoring organization's services. It should also be noted that those providing services for a PMAP frequently spend their days engaged in emotion-intensive interactions with lawyers and serve as highly visible representatives of the PMAP sponsor as well as liaisons between lawyers and the sponsor. The PMAP personnel must have an aptitude for dealing with varied personalities and situations, as well as the ability to juggle multiple demands. A high energy level, coupled with a solid belief in the critical need for the PMAP concept, also is essential.

Funding sources available to the PMAP must be considered in determining the type and number of people involved to implement the PMAP. An analysis of existing programs indicates that, at a minimum, the start-up staff of a PMAP should be comprised of a person who will assume principle responsibility for providing practice management advice. Additional personnel may be needed to assist in program development. Because PMAPs provide a valuable outreach opportunity to the PMAP sponsor and may have a beneficial effect on bar complaints, malpractice claims and the public image of lawyers, monitoring growth and providing appropriate administrative support is critical to program success.

Existing programs use volunteers in a number of ways, including: resources in particular subject areas,

practice monitors or mentors, speakers at educational events, and as members of the board responsible for overseeing the PMAP.

Professional development and skills training are important considerations in building PMAPs. PMAs need an opportunity to learn how other sponsoring entities are providing management services. Most areas of management are extremely dynamic and require constant effort to remain abreast of developments. A PMA's needs include the acquisition of, and time to utilize, subscriptions, software and other tools to keep current in the field. Participation in the ABA's Legal Practice Management Section's PMA Committee and the National Association of Bar Executive's Management Forum are highly recommended. Each serves to provide a PMA with as a strong and readily available network of rich resource. Membership in the LPM Section and the PMA Committee also provide excellent educational opportunities to PMAs as participants or presenters in the LPM Section's seminars.

See Appendix 4 – Sample of Initial PMAP Budgets

See Appendix 5 - Sampling of Job Descriptions for Existing PMAPs

Chapter V. Office and Equipment

A PMAP needs a private area to meet with members. This area should have state-of-the-art technology to enhance the PMA's access to members. To meet your PMAP's objectives, PMAs will need access to office support systems and personnel. Generally, the office will include a computer system and appropriate software to manage document production, the program's caseload, and communications. Many PMAPs require computer systems with capability to evaluate or demonstrate software programs in order to provide technology advice to lawyers. Some PMAs publish content directly on their sponsoring organizations' Web sites, while others manage the Web site. Several existing programs have been able to secure donations of software for evaluation or demonstration purposes.

If personnel of the PMAP travel extensively, additional equipment may be needed to enable them to conduct business while away. This equipment may include a cellular telephone, a notebook computer and portable printers. Those who frequently make presentations away from the office may also require presentation software, projectors, LCD panels or hardware and software enabling projection through a television monitor, or portable amplification systems.

Some existing PMAPs are able to afford or justify these expenditures by sharing both costs and utilization of equipment or resources with other programs operated by their sponsoring entity. For example, this type of equipment may be shared with providers of Continuing Legal Education or may be offered to lawyers engaged in pro bono representation.

Chapter VI. Financial Considerations

A. Sources of Funding

The services provided by most PMAPs are free or offered to the sponsoring entity's members at reduced rates. None are self-supporting, although some derive part of their funding from service fees or the sale of products. The PMAPs discussed in this Planning Guide primarily receive their funds from state bar associations, law societies or related entities. PMAPs provide valuable member services so funding needs to be made available to offer programs to members who need the PMAP's services.

Some possible sources of funding for a PMAP are listed below. These should, of course, be a starting point for consideration of program funding, not a limitation on the possibilities.

* Fully funded by the sponsoring entity
* Partial subsidy from a bar association, bar foundation, law society, CLE department or other sponsoring entity
* Funding from malpractice insurance carriers
* Contributions from lawyers
* Contributions of expertise, products or equipment from others interested in improving the delivery of legal services, such as vendors who handle law-related products or services (Some PMAP sponsors prohibit these types of contributions because they do not want to endorse, recommend or affiliate themselves with providers of services.)
* Fees for services, such as consultations, on an hourly, daily, flat fee or sliding-scale basis
* Sale of products generated by the PMAP such as video- and audiotapes, printed materials or computer software
* Sale of products generated by other providers (such as American Bar Association or private vendors) with a portion of proceeds retained by the PMAP
* Charges for e-mail or bulletin board services
* Continuing Legal Education course registration fees

Several jurisdictions with mandatory liability insurance requirements, such as Oregon, Alberta and Ontario, provide their services at no cost. In Oregon funding is provided through malpractice coverage assessments. In Ontario it is provided through mandatory bar dues. In Alberta funding comes from a combination of insurance premiums and mandatory bar dues.

B. Considerations for Voluntary Bar Associations

Voluntary bar associations throughout the country are struggling to retain members. These associations may regard PMAPs as a tool in recruiting members. PMAPs sponsored by voluntary bar associations may serve as a marketable benefit of membership and a significant, if indirect, source of dues income.

PMAPs are an effective way of adding value for members who need management services, such as those going directly into practice from law school or leaving large firm practice for solo practice.

C. Budget

It is not possible to provide a dollar figure for start-up capital and operating budgets for a PMAP because the amount of money needed is clearly tied to the factors outlined in the previous sections of this Planning Guide. The experience of currently operating PMAPs in developing budgets, however, may be of assistance.

Possible budget categories for expense items might include:

* Salaries
* Benefit and payroll taxes
* Newsletters
* Handbooks
* Library
* Videotapes
* Audiotapes
* Product delivery costs
* Postage
* Program promotion
* Equipment purchase
* Miscellaneous
* Speaker expense
* Accreditation fees
* Beeper and confidential phones
* Rent
* Travel
* Training
* Membership dues and subscriptions
* Facilities
* Office supplies
* Professional development

See Appendix 4 – Example of Initial PMAP Budgets

Chapter VII. Marketing and Referrals

Dissemination of information about the PMAP is critical to its ongoing success. Once the PMAP determines the services to be offered, members must be informed. With it's recent rapid growth, e-mail is becoming the most effective method of reaching many members quickly and inexpensively. In addition to making the PMAP's services known through e-mails to members, a regular column in the sponsoring entity's newsletter or magazine is recommended. Web site presence is also not only a must for the sponsoring entity but also for its PMAP. This presence substantially increases the number of members who can benefit from the PMAP's services by providing substantive advice that is of general benefit to the members, in a low cost and easy-to-deliver way.

Most currently operating PMAPs are filling a void in availability of free or reasonably priced management consulting services. For that reason, the demand for the services of these programs has been great, and demand is expected to remain high with minimal marketing by relying principally on recommendations from members who have received advice from the PMA.

With the above in mind, the following are possibilities for promoting the PMAP.

* Articles or ads in local bar association journals or other publications serving the legal community
* Bar cable television programs
* Press releases to publications serving the legal community
* Announcements at Continuing Legal Education events
* Letters and brochures to all lawyers or to targeted groups, such as new admittees or those who have had malpractice claims or disciplinary complaints
* Speaking engagements
* Cross-marketing with bar or other entities

Referrals can also be encouraged from sources such as the following:

* Disciplinary agencies
* Insurance carriers, either captive, bar-sponsored or private
* Programs serving impaired lawyers
* Courts
* Administrators of funds established for client protection
* Bar association committees, such as those involved with ethics advice or mentoring programs
* Private consultants, particularly those who target a different market segment than that typically served by PMAPs
* Current or previous users of PMAP services
* Professional associations for those in legal support positions such as legal administrators, paralegal and secretaries

PMAP personnel generally should maintain close relationships with these potential sources of referral to assure that they are kept informed of services and products offered by the PMAP.

Chapter VIII. Monitoring Program Success

Every program must be monitored to determine if it is meeting its articulated goal. A PMAP is no different. In some cases, the continuing existence of the PMAP may be tied to the ability to demonstrate to the sponsoring entity that the allocation of resources to the program is justified by the benefits it provides to members. The use of focus groups made up of members can be used to establish programs and services that are consistent with the PMAP's goal. Member surveys are also a practical method of determining the PMAP's success.

Feedback concerning the program can be used to identify strengths and weaknesses of existing services and products, as well as to determine other services that users desire. Feedback also can be used to chart the demographics of users, such as the size of the firm, length of time the lawyer has been in practice, location of the practice, and the history of malpractice claims or disciplinary complaints. This data can be used to pinpoint segments of the lawyer population that are using the program. This in turn reveals opportunities to target additional services to those segments or to promote the PMAP among those segments that are underrepresented in usage figures.

Feedback criteria, like decisions regarding services, staff, funding and all the other issues outlined in this Planning Guide, must be specific to the needs and circumstances of the particular PMAP. Some may want to include a basic "user satisfaction" question. Programs that interface with disciplinary authorities or representatives of other programs will also need to seek input regarding their success in meeting the needs of those groups.

Areas in which a PMAP may wish to seek feedback include:

* profile of program user
* satisfaction with program services
* satisfaction with program products
* volume of requests for services and products
* sources of referral
* effectiveness of marketing efforts
* effectiveness of educational programs and training activities

The program of the Law Society of Upper Canada, for example, tracks participation through a computer program which records statistics such as the year of call to the bar (admission to practice) of members who contact the service; the staff member who handled the call, the mode of inquiry (telephone, letter, facsimile, etc.), and source of the referral. The computer program also correlates the topic of inquiry to the year of call to the bar and to practice setting (sole practitioner, firm member, etc.). Statistics are provided on the number of calls handled by each staff member. The system does not automatically track repeat users of the service; however, this information may be obtained by a manual count.

Oregon's evaluation form tracks the source of referral and asks specific questions about satisfaction with the program. The statistics generated from the evaluation forms are useful in determining when additional staff is needed. For example, one question asks for feedback on length of time between initial contact and appointment. Diminished satisfaction level in this area is one indicator that program demand exceeds current ability to respond.

See Appendix 6 - Sample Evaluation Forms

Chapter IX. Conclusion

PMAPs and Programs have proven to be an effective means to assist lawyers. This guide was written to identify the purposes for creating PMAPs and the specific benefits a PMAP or Program can provide to your members. Suggested services and funding mechanisms have been included to assist the sponsoring entities in evaluating the feasibility of sponsoring a PMAP and to assist in the process of setting up a program. While this Guide may have answered many of your questions, it is likely to have raised more. The PMAs of existing programs are willing to answer any questions that you may have. Bar association officials are encouraged to contact one of the PMAs listed in Appendix 7.

See Appendix 7- List of Practice Management Advisors

See Appendix 8 - List of Top Ten Resources Used by Practice Management Advisors

Appendix 1 - Samples of Confidentiality Provisions

OREGON

Oregon Code of Professional Responsibility
(January 29, 1997)
DR 1-103

DR 1-103 Disclosure of Information to Authorities; Duty to Cooperate

(A) A lawyer possessing knowledge that is not protected by DR 4-101 or ORS 9.460(3) that another lawyer has committed a violation of DR 1-102 that raises a substantial question as to that lawyer's honesty, trustworthiness or fitness as a lawyer in other respects, shall inform Oregon State Bar Disciplinary Counsel.

(B) A lawyer possessing unprivileged knowledge or evidence concerning another lawyer or a judge shall reveal fully such knowledge or evidence upon proper request of a tribunal or other authority empowered to investigate or act upon the conduct of lawyers or judges.

(C) A lawyer who is the subject of a disciplinary investigation shall respond fully and truthfully to inquiries from and comply with reasonable requests of a tribunal or other authority empowered to investigate or act upon the conduct of lawyers, subject only to the exercise of any applicable right or privilege.

(D) A lawyer admitted to practice in this state shall, within 30 days after receiving notice thereof, report in writing to the disciplinary counsel of the Oregon State Bar the commencement against the lawyer of any disciplinary proceeding in any other jurisdiction.

(E) The provisions of DR 1-103(A) shall not apply to lawyers who obtain such knowledge or evidence while:

(1) Acting as a member, investigator, agent, employee or as a designee of the State Lawyers Assistance Committee; or

(2) Acting as a board member, employee, investigator, agent or lawyer for or on behalf of the Professional Liability Fund; or

(3) Participating in the loss prevention programs of the Professional Liability Fund, including the Oregon Attorney Assistance Program.

(F) A lawyer who is the subject of a complaint or referral to the State Lawyers Assistance Committee shall, subject to the exercise of any applicable right or privilege, cooperate with the committee and its designees, including:

(1) Responding to the initial inquiry of the committee or its designees;

(2) Furnishing any documents in the lawyer's possession relating to the matter under investigation by the committee or its designees;

(3) Participating in interviews with the committee or its designees; and

(4) Participating in and complying with remedial program established by the committee or its designees.

ALBERTA, CANADA

31.1 (1) The Office of the Practice Advisor is established.

(2) The Secretary may appoint to the Office of the Practice Advisor, a Practice Advisor, a Practice Management Advisor, a Risk Management Advisor or other officers to provide services and resources to members to aid them in maintaining and improving their ability to serve the public interest.

(3) Communications between members and the Office of the Practice Advisor are confidential unless a communication reveals the misappropriation or the likely misappropriation of funds, or the likelihood of physical harm to any person.

(4) Office of the Practice Advisor incumbents are relieved from the obligation to report to the Law Society pursuant to Chapter 3, Rule 4 of the Code of Professional Conduct, except in the instances set out immediately above in (3).

(5) Office of the Practice Advisor incumbents will not be called by the Law Society to give evidence in any proceedings under Part 3 against a member. Provided that if a member puts in issue communications with such an incumbent, thereby waiving confidentiality, the Law Society may call such incumbent to give evidence on that issue.

GEORGIA

CHAPTER 1
CONFIDENTIALITY

Rule 11-101, Confidentiality.

Information obtained by the staff on the Law Practice Management Program shall be confidential unless the affected attorney otherwise elects or unless the information clearly shows the attorney intends to engage in criminal conduct in the future.

DISTRICT OF COLUMBIA

Rule 1.6(i) of the District of Columbia Rules of Professional Conduct
Modification to Rule 1.6 for Lawyer Practice Assistance Program effective May 1, 1998

(i) FOR PURPOSES OF THIS RULE, A LAWYER WHO SERVES AS A MEMBER OF THE D.C. BAR LAWYER PRACTICE ASSISTANCE COMMITTEE, OR A STAFF ASSISTANT, MENTOR, MONITOR OR OTHER CONSULTANT FOR THAT COMMITTEE, SHALL BE DEEMED TO HAVE A LAWYER-CLIENT RELATIONSHIP WITH RESPECT TO ANY LAWYER-COUNSELEE BEING COUNSELED UNDER PROGRAMS CONDUCTED BY OR ON BEHALF OF THE COMMITTEE._ COMMUNICATIONS BETWEEN THE LAWYER BEING COUNSELED UNDER THE AUSPICES OF THE COMMITTEE, OR MADE IN THE COURSE OF AND ASSOCIATED WITH SUCH COUNSELING, SHALL BE TREATED AS A CONFIDENCE OR SECRET WITHIN THE TERMS OF PARAGRAPH (b)._ SUCH INFORMATION MY BE DISCLOSED ONLY TO THE EXTENT PERMITTED BY THIS RULE._ HOWEVER, DURING THE PERIOD IN WHICH THE LAWYER-COUNSELEE IS SUBJECT TO A PROBATIONARY OR MONITORING ORDER OF THE COURT OF APPEALS OR THE BOARD ON PROFESSIONAL RESPONSIBILITY IN A DISCIPLINARY CASE INSTITUTED PURSUANT TO RULE XI OF THE RULES OF THE COURT OF APPEALS GOVERNING THE BAR, SUCH INFORMATION SHALL BE SUBJECT TO DISCLOSURE IN ACCORDANCE WITH THE ORDER.

NOTE: Not all states have a similar provision guarding the confidentiality of discussions by PMAs with members.

Appendix 2 - Mission Statements of Certain Existing Programs

GEORGIA

PART XI
LAW PRACTICE MANAGEMENT PROGRAM

Preamble

The purpose of the Law Practice Management Program is to provide law office management consulting services and materials to the members of the State Bar of Georgia, and thereby to facilitate and improve the delivery of legal services to the public.

NEW YORK STATE

NEW YORK STATE BAR ASSOCIATION
COMMITTEE ON
LAW OFFICE ECONOMICS AND MANAGEMENT

MISSION STATEMENT

The Committee on Law Office Economics and Management of the New York State Bar Association is devoted to assisting members of the legal profession in New York to efficiently and effectively deliver legal services through a variety of means and practices including, but not limited to, administrative systems, client relations, human resources, continuing legal education, financial management, substantive systems, marketing, office facilities, risk management, strategic planning, technology and trust accounting. As advisor to the Law Office Economics and Management Department of the New York State Bar Association and with the coordination of the director of the department, the Committee will:

- educate Association members as to the benefit of improved office procedures;
- monitor and evaluate developments in the field of law office economics and management;
- compile and disseminate information regarding law practice management, and promote the availability of law practice management educational programs throughout the state;
- develop ethical standards regarding the use of paralegal personnel, enhance education opportunities available to such personnel, and promote the use of paralegals where appropriate;

- coordinate with substantive law sections and committees of the Association to prepare materials and programs which will permit the systematic and efficient delivery of legal services;

- promote risk management practices within law firms throughout New York State;

- coordinate with local bar associations and interested ABA entities to pursue mutual goals and objective, and;

- provide direct guidance to association members with respect to nonstandard law practice managerial issues where existing literature or educational materials are inadequate.

OREGON

Oregon State Bar
STATEMENT OF MISSION:

The mission of the Professional Liability Fund is to manage for the Oregon State Bar, the legal malpractice liability program at the least possible assessment consistent with sound financial condition, superior claims handling, efficient administration, and effective loss prevention.

Loss Prevention Goal #LP-1 - Decreasing Legal Malpractice: To decrease the severity and frequency of legal malpractice, with a corresponding reduction in indemnity payments and defense costs.

TEXAS

State Bar of Texas

The Law Office Management Program was implemented by the State Bar of Texas to establish processes and procedures to assist solo and small firm practitioners in the delivery of legal services, by developing and promoting competent, professional, efficient, effective, economical, and innovative law office management practices.

ALBERTA, CANADA

THE LAW SOCIETY OF UPPER CANADA
PRACTICE ADVISORY SERVICE

MISSION STATEMENT

Wherever there is statutory regulation of a group, there is a need for the members of the group to be able to approach the regulators on a confidential basis, with objective of complying with the Regulations.

With this as the accepted basis for the existence of the Practice Advisory Service, we hope to develop a policy of assistance to the profession:

- which has a loss prevention effect

- which leads to smoother relations between our members and other departments of the Law Society

- which is humane and caring interface between regulators and those regulated.

Appendix 3 – Services Offered by Certain Existing Programs

Unified Bars
Voluntary Bars

DC	FL	GA	TX	ON[1]	AZ	NC	OR	SC	AB[2]	BC[3]	NY	MD
TELEPHONE CONSULTATION ON PRACTICE MANAGEMENT ISSUES												
X	X	X		X	X	X	X		X	X	X	X
ON-SITE CONSULTATION ON PRACTICE MANAGEMENT ISSUES												
X	X	X		X	X	X	X		X	X		X
AREAS IN WHICH CONSULTATIONS ARE PROVIDED												
• Calendaring												
X	X	X		X	X	X	X		X	X		X
• Conflict-of-interest systems												
X	X	X		X	X	X	X		X	X		X
• Mail handling												
X	X	X		X	X	X	X		X	X		X
• Time and billing issues and systems												
X	X	X		X	X	X	X		X	X		X
• Trust accounting												

Appendix 3 – Services Offered by Certain Existing Programs

X	X	X		X	X	X	X		X	X		X
• General accounting												
X	X	X		X	X	X	X		X	X		X
• Financial management												
X	X	X		X	X	X	X		X	X	X	X
• Client communications												
X	X	X		X	X	X	X		X	X	X	
• Computer software demonstration/discussions												
X	X	X		X	X	X	X		X	X	X	X
• Evaluation of firm computer needs and recommendation of software and/or hardware												
X	X	X			X	X	X		X	X		X
• Computer and software training												
	X	X			X	X		X				
• Client relations issues												
X	X	X		X	X	X	X		X	X	X	X
PRESENTATIONS												

Appendix 3 – Services Offered by Certain Existing Programs

• **In-person presentations on practice management at bar association or other attorney meetings, seminars, and CLE events**												
X	X	X		X	X	X	X		X	X	X	X
• **Technology training for attorney and/or support personnel**												
X	X	X				X	X	X		X	X	
• **Educational program s for legal support personnel**												
	X	X				X	X		X	X	X	X
• **Sponsorship or development of technology trade shows**												
	X					X					X	X
• **Course instruction to lawyers in lieu of formal disciplinary sanctions in appropriate cases (ethics school)**												
X	X	X				X						

1 Province of Ontario, Canada
2 Province of Alberta, Canada
3 Province of British Columbia, Canada

NOTE: Responses to this survey have been grouped by the size of the bar association providing the practice management program. The categories used are:

Large Bar = More than 15,000 members
Medium Bar = 5,000 - 14,999 members
Small Bar = 4,999 or fewer members

Appendix 4 – Sample Budget for Initial PMAP

Since each state and bar association has its individual needs, the budget for a program will also vary from state to state, county to county and city to city. The following is a sample of a city PMAP budget. As a city PMAP, there is little travel expense invovled with visting or reaching members. Also note, that this budget does not include overhead items that are used by some organizations as part of the PMAP's budget. The second sample budget shows an overhead allocation not included in the first.

A PMAP can be as simple and as complex as the sponsoring entity determines. It can have part-time staffing or full time staffing, employees, or consultants. Every decision affects the budget. The two included are merely examples and not intended as models.

City PMA Program
Initial 12 month Budget

Income	
Membership Income	$500 - $1500
Expenses	
Salary	$100,000 - $125,000[1]
Employee Benefits	$20,000 - $25,000
Stationery & Supplies	$500 - $1,000
Office Equipment	$5,000 - $7,000
Office Furniture	$500 - $2,000
Postage	$250 - $500
Photocopy Expenses	$1,000 - $1,500
Telephone Usage	$3,600 - $5,000
Books and Periodicals	$1,500 - $3,000
Membership Fees	$500 - $1,000
Meeting Fees	$1,000 - $3,000[2]
Travel	$500 - $3,500
Miscellaneous	$2,000 - $4,000
Total Expenses	$134,350 - $206,500
Net Operating Loss	$133,850 - $205,000

[1] For a Director and one assistant

[2] Includes registration for meetings as well as lodging and meals.

State PMA Program
Initial 12 month Budget

Personnel Services:	
Salary - Consultant	$60,000.00 "
Salary - Resource	$40,000.00 "
Salary - Secretary	$22,000.00 "
Taxes & benefits*	$28,602.00 "
Subtotal	$150,602.00 "
Operating Expenses:	
Shared Office Overhead	$45,000.00 "
Postage	$3,500.00 "
Miscellaneous	$1,250.00 "
Travel**	$25,000.00 "
Printing	$5,000.00 "
Supplies	$1,500.00 "
"Subscriptions, Books, & Memberships"	$9,000.00 "
Labels	$200.00
Seminars	$500.00
Computer software	$750.00
Luncheons	$1,000.00 "
Subtotal	$92,700.00 "
Computer Equipment	$7,500.00 "
Furniture & Equipment	$6,000.00 "
Total Law Practice Management	$256,802.00 "

*Pension costs included but not funded until after anniversary date plus +1000 hours of service

**Travel based on expenses of both Consultant and Resource Personnel

Appendix 5- Sample Evaluation Form

PROFESSIONAL LIABILITY FUND SERVICE-QUESTIONNAIRE

Practice advisor who assisted you:

_____

Date of Service:

_____

How did you hear about our services? (check all that apply.)
__ Know PLF staff member (or) was contacted by the PLF
___ Referred by someone else (or) by word-of-mouth
___ Saw advertisement or brochure
___ Heard about it at CLE
___ Other (please explain):

What is your opinion about the following:

Very satisfied
Satisfied
Dissatisfied
Very Dissatisfied

Reaching a Practice Management Advisor by telephone

Having your telephone calls returned

The amount of time between when you called for an appointment and when the appointment took place

Practice Management Advisor's ability to explain information clearly

How you were treated (i.e. patience, courtesy)

Was the information helpful to your needs?

Follow-up

Overall, what is your level of satisfaction with
our service?

Would you recommend our services to others?
___ Yes ___ No

What changes or improvements have you made in your office as a result of the practice management advisor visit?

_____

_____

Comments, suggestions, additional feedback (use additional space if needed):

_____

_____

Would you like us to contact you to schedule a follow-up visit?
___ Yes _____Not Needed

Name (optional):

Bar No.:

Firm (optional):

Thank you for taking the time to complete our questionnaire. Please feel free to call the PLF anytime we can be of service to you (639-6911 or 1-800-452-1639).

Please return questionnaire to:
Barbara S. Fishleder
P.O. Box 1600
Lake Oswego, Oregon 97035.

DISTRICT OF COLUMBIA BAR LAWYER PRACTICE ASSISTANCE PROGRAM

MEMBER SERVICE QUESTIONNAIRE

Thank you for your recent call to the Management ResourceLine, the telephone advisory service of the D.C. Bar to answer law practice management questions for Bar members. To help us improve our service, please answer the following brief questionnaire. The questionnaire is anonymous, unless you choose to include your name here: _____

1. How did you learn of the Management ResourceLine service?
__ From a colleague
__ From a D.C. Bar publication
__ Called the Bar and was referred to the ResourceLine
__ From the Mandatory Course for New Admittees to the D.C. Bar
__ Other circumstances; please explain:_____

2. Please rate the Management ResourceLine advisory service in the following areas:

Very satisfied
Satisfied
Dissatisfied
Very Dissatisfied

Promptness of response to your inquiry

Practice advisor's understanding of your inquiry

Usefulness of information received

Effectiveness of suggested solution(s)

Accessibility and convenience of service

3. Would you use the Management ResourceLine again: ___ Yes ___ No

4a. Would you recommend the Management ResourceLine to your colleagues:
___ Yes ___ No

4b. If you would not recommend this service to a colleague, please state your reasons, especially if not detailed elsewhere in these questions:

_____

_____

5. What could the Lawyer Practice Assistance Program do to make the Management ResourceLine more responsive to your needs?

_____

_____

6. What other Bar programs or services (including Membership Benefits, CLE, and Sections programs) have you used in the past 12 months?

_____

_____

7. As a result of your recent telephone inquiry, in your opinion, how valuable is the Management ResourceLine telephone advisory service to your practice?

___ Very valuable
___ Valuable
___ Not Valuable
___ Waste of time

Thank you for completing this questionnaire. Please use the attached envelope to return the completed questionnaire to the Lawyer Practice Assistance Program. Please let us know when we can be of service to you in the future.

The Lawyer Practice Assistance Program is developing additional programs to assist D.C. Bar members in the practice of law. If you would like additional information about our programs, please call the Lawyer Practice Assistance Program at 202/737-4700 x212.

Appendix 5 - Sampling of job descriptions

ARIZONA

POSITION DESCRIPTION
State Bar of Arizona
Programs and Public Services Division

JOB TITLE: Law Office Management Assistance Program Director

GRADE: VI, Exempt

SUPERVISOR: Assistant Executive Director

REPORTS TO: Assistant Executive Director

SUMMARY:

Responsible for the overall coordination and management of [the diversion program and] the Law Office Management Assistance Program, including services provided through self-referral, through referral from Discipline, and monitoring of terms of probation. Conducts evaluations, serves as a case manager/consultant and, when appropriate, serves as a referral source for individuals participating in the diversion program.

RESPONSIBILITIES:

Consistent with expertise, evaluates office practices and procedures of individuals identified for the program and prepares written reports with recommendations.

Maintains and disseminates information on computer hardware and software and office products and services, as well as available community management resources.

Assists in creating terms of diversion and probation and monitors compliance with terms imposed upon participants.

Maintains confidential records pertaining to diversion program.

Trains practice monitors regarding the purposes and objectives of the diversion and/or probation programs and the individual responsibilities of a monitor. Provides ongoing consultation regarding monitoring activities as needed or desired.

Creates a schedule of fees for services for approval by the Board of Governors and recommends revisions

as appropriate.

Formulates and monitors the annual program budget.

Participates in sections, committees and other groups which provide education on management issues or promote use of technology in the legal environment.

Provides seminars and programs for attorneys and/or their support staff to educate them in avoiding bar complaints and malpractice claims and to market services available through LOMAP and other Bar programs.

Develops ready-to-mail resource materials.

Handles telephone inquiries on management-related topics and develops custom materials as needed.

Consults as requested regarding SBA or ABF internal departments or procedures.

DESIRED KNOWLEDGE, SKILLS AND ABILITY:

Thorough knowledge of all aspects of office management; law firm management experience desirable.

Excellent written and verbal communication skills.

Knowledge of computer hardware and software required.

Ability to effectively supervise and work with volunteers.

Ability to formulate and monitor budgets.

Ability and willingness to travel extensively statewide and possession of a valid Arizona driver's license.

Knowledge of community resources desirable.

Willingness and ability to work in intra- and interdepartmental teams to identify and resolve opportunities for improvement and to raise the overall quality of the SBA and ABF.

DISTRICT OF COLUMBIA

DIRECTOR, LAWYER PRACTICE ASSISTANCE PROGRAM

I. Purpose

The LPAP Director manages a multifaceted program that provides law practice management information, resources, and assistance to attorneys who are members of the D.C. Bar. The LPAP Director reports directly to the Regulation Counsel.

II. Policy

The mission of Lawyer Practice Assistance Program is to design and implement educational and remedial programs to assist members establish and sustain sound policies and procedures in all aspects of practice management, including financial management, client relations and communication, business planning, office technology, risk management, office systems and procedures, and document management. By improving management practices, the LPAP seeks to improve the delivery of legal services, reduce disciplinary complaints, and help Bar members to avoid practice problems that may lead to malpractice claims.

III. Responsibilities

The primary responsibilities of the LPAP Director include:

A. Staff the Management ResourceLine
B.Conduct voluntary practice management assessments
C. Administer Practice Monitor Program
D. Administer Lawyer Practice Assistance Committee.
E. Continual development of LPAP components, including a resource library.
F. Assist with the development of educational programs for lawyers on law practice management issues.
G. Develop and distribute promotional materials to explain the LPAC program to potential participants.
H. Assign and monitor tasks performed by the Administrative Specialist assigned to LPAC.

IV. Procedures

A. Staff the Management ResourceLine

1. The Management ResourceLine, a telephone resource service to answer questions about office management and technology, and direct members to informational resources on a wide range of practice management issues.
2. Questions are often answered during the telephone call, but some require research from sources including periodicals and the internet. Members whose questions require research are called back within 24 to 48 hours.
3. Information about the call is maintained by the Director for use in improving the program service.
4. A written questionnaire is mailed to each caller, on a monthly basis.

B. Conduct voluntary practice management assessments

1. On-site practice management assessments are available to Bar members who desire more comprehensive analysis and assistance with the management of their practice.
2. At present, these voluntary assessments are scheduled with the approval of the Lawyer Practice Assistance Committee.
3. Members requesting an assessment are sent preliminary materials that must be returned prior to scheduling the actual assessment.
4. The assessment is usually 1 to 2 days in duration; on-site at the member's office.
5. A follow-up report may be drafted and sent to the member, providing a summary of the practice advisor's observations, and suggestions for improvements.

C. Administer Practice Monitor Program

1. Recruit potential practice monitors; assist the LPAC in the screening and selection of practice monitors; develop training materials and program for practice monitors.
2. Coordinate with Office of Bar Counsel or Board on Professional Responsibility to accept attorneys into the program to be monitored.
3. Conduct practice management assessment of monitored attorney, and provide a written report of findings, with suggestions for practice improvements.
4. Work with program participants to resolve any problems. Evaluate and improve program.

D. Administer Lawyer Practice Assistance Committee.

1. Complete tasks as assigned by the Committee
2. Assist in drafting LPAC rules of procedure; periodically review and propose amendments, as needed, to the rules of procedure.
3. Prepare annual and interim reports, including narratives and statistical summaries, as required.
4. Oversee preparation of LPAC minutes and draft other LPAC documents.
5. Develop and administer annual LPAC operating budgets.
6. Plan and conduct periodic meetings of the LPAC and LPAC subcommittees.
7. Development of additional LPAP components, including a resource library.
8. Review program and member needs to update, modify, and improve program components to better serve Bar members.
9. Research other similar programs nationwide, identify possible improvements, and implement into existing program.

E. Assist with the development of educational programs for lawyers on law practice management issues.

1. Provide information to CLE and LPMS about current management needs of Bar members, and assist in developing programs to meet those needs.
2. Assist in presentation of CLE and LPMS programs.

F. Develop and distribute promotional materials to explain the LPAC program to potential participants.

1. Initiate and conduct marketing plan to Bar members with the concurrence of LPAC subcommittee.
2. Actively pursue opportunities to address Bar members in a variety of forums, including voluntary bar meetings, section activities, CLE programs, and other Bar activities.

G. Assign and monitor tasks performed by the Administrative Specialist assigned to LPAC.

GEORGIA

Law Office Management Consultant
Job Description

Employee's Name:_____

Employee's Supervisor: Chief Operating Officer

Position: Director of Law Practice Management Program

Reporting Relationships:
The Director of Law Practice Management Program shall report directly to the Executive Director of the State Bar and shall work with, and be responsive to, the LPM Advisory Committee established by the Board of Governors to supervise and govern the Law Practice Management Program.

General Statement of Job Responsibility:
The Director of Law Practice Management Program shall be employed by the State Bar of Georgia for the purpose of developing, implementing and administering a Law Practice Management Program so as to provide information, materials, consulting evaluations, and advice to lawyers on law office management issues. This position is exempt form the Fair Labor Standards Act in that it is a salaried position and is not subject to claims for overtime compensation.

Specific Responsibilities:
1. Prepare and maintain a plan for development of a Law Practice Management Program.

2. Consult with law firms for the purpose of evaluating office procedures and making recommendations to improve operation and management thereof, to include issues relating to personnel, risk management, equipment, accounting and billing procedures, and other office systems.

3. Develop and maintain a resource library of law office management materials, and develop procedures

for making that information available to Bar members.

4. Serve as a speaker at local Bar Associations for purposes of promoting the Law Practice Management Program.

5. Participate in seminars and, in coordination with the Institute of Continuing Legal Education (ICLE), arrange seminars dealing with the law office management issues which qualify for Continuing Legal Education credit.

6. Remain current on law office technology issues, including compatibility and use of products.
7. Travel extensively as needed to participate in seminars, speaking engagements, and office evaluations.

8. Participate in the interviewing and hiring of support personnel to include library/resource and secretarial employees, and provide supervision and management for those staff members.

9. Adhere strictly to the confidentiality rule relating to the Law Practice Management Program.

Minimum Relevant Experience:
1. Law degree desired or alternatively full-time law firm administration desired.

2. Personal involvement in private sector law firm management or consulting for a minimum of four years within the previous eight years.

NEW YORK STATE

NEW YORK STATE BAR ASSOCIATION
Law Office and Economics and Management Department

PRIMARY RESPONSIBILITIES: To assist members of the Association in the efficient and effective delivery of legal services.

RELATION TO NYSBA'S STATED PURPOSE: The Law Office Economics and Management (LOEM) Department helps members learn practice management skills needed to run a law practice. The department works to develop educational programs, to address the following areas of concern: administrative and substantive law systems, client relations, financial management, marketing, strategic planning, technology, risk management, and trust accounting.

PROJECTS AND PROGRAMS: (a) Resource Library --books, journals and periodicals on the topic of law office management; (b) assist in the development of practice management programs for lawyers, paralegals and other legal support personnel; (c) answer members' questions relating to practice management and law office systems; (d) coordinate computer conference and exhibition with county bar associations; (e) the Paralegals Subcommittee is currently reviewing the "Guidelines to Utilization of Paralegals," which was originally written in 1976.

DEPARTMENTAL STRUCTURE: The Director of LOEM serves as liaison to the Law Office Economic and Management Committee and the Special Committee on Access and Retrieval of Government Records. Steve is responsible for the development of programs and activities, to address concerns of Bar members. LOEM secretary, assumes primary responsibility for maintaining the resource center. This includes distributing information as requested. Sue coordinates all programs and manages all department files.

DEPARTMENTAL SKILLS: Telephone skills, organizational skills to manage data and physical files, knowledge of legal software and information sources.

OREGON

OREGON STATE BAR PROFESSIONAL
LIABILITY FUND JOB DESCRIPTION

PRACTICE MANAGEMENT ADVISOR

JOB ELEMENTS

Provides practice management education to lawyers, legal secretaries and other staff through on-site visits,

publications and seminars.

JOB DUTIES

1) Provides on-site and telephone education to lawyers and their staff on how to improve law office operations, including calendaring, mail handling, docket control, conflict of interest systems, filing procedures, computer hardware and software, file documentation, file management and retention, time management, trust accounting, time and billing procedures and client relations.

2) Assist in the planning, scheduling and production of seminars and workshops.

3) Speak and lecture to groups of attorneys and law office personnel on various practice management topics.

4) Write and edit loss prevention and practice management educational materials including newsletter articles, handbooks, practice aids, CLE publications, and promotional materials.

5) Monitor new claim activity and identify attorneys having claims involving practice management issues. Research and develop systems and checklists to help prevent these errors.

6) Provide loss prevention assistance to offices which have an attorney who is unable to continue practicing law. Determine which cases should be reviewed by PLF claims attorneys for repair assistance. Assist secretarial staff with the smooth transfer of client files to other counsel. Assist repair attorneys to obtain extensions and set-overs where needed.

7) Monitor legislative, case law, and administrative changes which impact existing law office systems and practice aids. Implement, adjust and develop appropriate systems and practice aids in response.

8) Assist lawyers whose disciplinary process requires education in practice management and/or trust accounting procedures.

9) Provide assistance to lawyers as requested by the underwriting committee of PLF Excess Fund.

10) Cooperate and participate in Bar committees and other legal organizations in order to further promote the awareness of malpractice prevention.

JOB SPECIFICATIONS

1) Education Required:

College graduate or equivalent in experience. Knowledge of law office administration, public speaking, writing, program planning, insurance principles, communication skills, teaching,

counseling, and EAP principles.

2) Scope of Duties (see job duties and job examples for details):

Teaching lawyers and law office staff how to implement law office systems to reduce the risk of legal malpractice, extensive knowledge of computer software and hardware, public speaking, writing, review and analysis of technical materials and procedural rules.

3) Experience and Qualifying Period:

Minimum five years experience as legal secretary, legal assistant, law office administrator or attorney. Requires computer, teaching, public speaking, management and writing experience. Some knowledge of EAP principles and insurance principles. Six month qualifying period.

4) Responsibility and Initiative:

Responsible for developing law office systems and teaching practice management through on-site visits, seminars and publications. Keep current with management trends and ideas. Keep current with computer technology and software availability. Requires self direction and the ability to exercise independent judgment. Reports to the Director of Loss Prevention.

5) Contacts Required:

Extensive contact with attorneys and law office personnel. Frequent contact with PLF Claims Attorneys and OSB Disciplinary Counsel. High degree of tact, diplomacy, sensitivity and confidentiality required.

6) Concentration:

High degree of concentrated and exacting mental attention. Creative, logical and analytical reasoning required. High level of listening skill required.

7) Supervisory Responsibility:

Generally not a part of this position. Occasionally supervises law office or hired staff when closing a law office to ensure the job is done as quickly, efficiently, discreetly, and confidentially as possible.

ALBERTA, CANADA

JOB DESCRIPTION

Title: PRACTICE MANAGEMENT CONSULTANT

The mandate of the Practice Management Consultant is to provide law office management consultation to members of the Law Society of Alberta, with the primary focus being on the needs of solo and small-firm practitioners.

To carry out this mandate, the Practice Management Consultant engages in the following activities:

1. **Phone calls**

- responds to member requests for information on a wide variety of law office management and administration questions

- "backs-up" phone service provided by Practice Advisor during his absence or where member prefers to talk to Practice Management Consultant

2. **Office consultations**

- travels extensively throughout Alberta to conduct on-site meetings with lawyers who request consultations, including:

  Decision meetings: meetings that take up to 2 hours during which the Practice Management Consultant tries to assess the plans of a lawyer or group of lawyers, commonly with respect to a transition in practice

  New Office Consultation: 3 to 5 hour structured meetings during which the Practice Management Consultant covers a number of topics relevant to opening a new law office. Part I of the New Office Consultation focusses on helping the lawyer to develop a business-like management approach that will help the lawyer to see the development of the practice in a long-term perspective. Part II focusses on specific management and administration concerns like accounting, file management, cash flow, time management, marketing, technology, etc.

  Existing Office Consultations: 3 hour or longer structured meetings (sometimes in retreat format) during which the Practice Management Consultant responds to the specific needs of an existing office. Some Existing Office Consultations are broad-ranging "tire-kickers" that cover some of the same material as Part I of the New Office Consultation, then focus on the particular needs of the lawyers who requested the meeting. Others are more focussed on specific identified needs, such as restructuring after the departure of a senior lawyer or reworking the compensation arrangement in a firm.

  Major Office Consultations: like Existing Office Consultations, but include a written report and follow-up.

Technology Consultations: 2 -5 hour structured meetings in which the Practice Management Consultant covers a number of topics relevant to managing technological change, then focusses in on areas of technological concern identified by the organization.

3. **Conduct Review Committee Referrals**

- consults with members pursuant to undertakings given to the Conduct Review Committee, including reporting back to the Conduct Review Committee.

4. **Law Society Committees**

- regularly attends meetings of Conduct Review Committee and Professional Responsibility Committee

- attends meetings of Benchers, other Law Society standing and ad hoc committees, and staff when needed to provide input regarding office management, small-firm perspective

5. **Information Bank**

- monitors developments with respect to a wide range of law office management and technology issues and products, which requires extensive reading of books and magazines, attendance at conferences, writing for brochures and demo discs, and networking with other practice management consultants and educators throughout North America

- developed and now maintains extensive information database on law office management and technology issues and products

- responds to requests from members for:

  - print-outs from database on law office management and technology topics
  - copies of articles, brochures, chapters of books and other printed material
  - demo discs, videos and other resources

- lends members books, demo discs, videos and other resources on law office management and technology topics

- develops "packages" of materials on law office management and technology topics using the information database

6. **Publications**

- distributes law office management publications, including the *Start-up Kit*, (revised every year or so), *Guide to Manual Law Office Bookkeeping*, *Cash Flow Management*, *Financial Considerations in Setting Up a Law Practice*, *Down the Garden Path*, *Unravelling the Knot*, *Case Management Software*, *Rethinking Billing*, *Death or Disability of a Solo Practitioner*, *Managing to Prevent Losses*, and *Closing the Gap: Realizing the potential of technology through law office management*

- writes or edits and supervises the publication and distribution of additional publications as demand arises
- writes articles for Benchers' Advisory, LSA/CBA Newsletter

7. **LESA, Bar Ad, CBA**

- presents and organizes presentations at LESA programs

- participates on team responsible for writing practice management portion of Bar Ad course

- presents and organizes presentations on practice management issues at CBA section meetings and Mid-Winter meetings

8. **Client Service Improvement Initiative**

- provides organizational energy, staff support for Client Service Improvement Initiative

9. **Administrative responsibilities**

- supervises and evaluates Secretary/Office Administrator to the Practice Management Consultant and acts as senior Law Society staff person in Edmonton office

- helps resolve minor administration and technology problems in Edmonton office
- approves Edmonton office bills for payment
- keeps statistical information for monthly and annual reports of Office of the Practice Advisor
- arranges travel and submits expense accounts

10. **General**

- supports LSA by attending meetings, etc. where presence of Practice Management Consultant enhances members' perception of LSA's concern to assist members
- develops software for internal Law Society use (e.g., Code of Conduct software)

KEY JOB FUNCTIONS OF DIRECTOR

1. General management and direction of the professional and non-professional staff of the Practice Advisory Service in its day to day operations (3 staff lawyers, 3 secretaries, half-time systems advisor).

2. Providing guidance to members of the Law Society concerning practice problems or law office administrative problems, particularly those of a complex nature.

3. Developing proposals for new initiatives to be undertaken by the Service.

4. Reviewing the services provided to members of the Law Society, and providing policy direction concerning the manner in which services are delivered.

5. Coordinating the activities of the Service with other departments of the Law Society and with other Professional Associations or organizations.

6. Reporting the activities of the Service to Senior Law Society Administrative staff and to Convocation, through Professional Standards Committee.

7. Providing some counseling to members in regard to personal problems (stress, alcoholism, career questions, retirement, etc.,) and assisting in obtaining professional or other qualified assistance.

KEY JOB FUNCTIONS OF STAFF LAWYER

1. Provision of guidance and advice to members of the Law Society regarding solicitor-client relationships,

ethical issues, interpretation and application of the rules and regulations governing the members, the appropriate conduct of a member in emergency situations, professional arrangements, and procedural and legal matters pertaining to clients' files.

2. Assisting in the preparation of materials for distribution to the profession.

3. Assisting in the collection and preparation of materials for the Bar Admission Course on the Business of the Practice of Law.

4. Assisting with the Benchers' committee work as required.

Appendix 7 - List of Practice Management Advisors
(as of November 2000)

PRACTICE MANAGEMENT ADVISORS

Alabama
Laura Calloway, Director
Law Office Management Assistance Program
Alabama State Bar
415 Dexter Avenue
Montgomery, Alabama 36101
Telephone: (334) 269-1515
Fax: (334) 261-6310
E-Mail: lcalloway@alabar.org
Web site: http://www.alabar.org/page.cfm?view=16

Alberta, Canada
Paul McLaughlin
Practice Management Advisor
The Law Society of Alberta
1900, 10104 - 103 Avenue
Edmonton, Alberta T5J 0H8
Telephone: (403) 429-3343
Fax: (403) 424-1620
E-Mail: pracman@lawsocietyalberta.com
Web site: http://www.alabar.org/page.cfm?view=16

American Bar Association
Charlotte K. Stretch, Special Counsel
ABA Center for Professional Responsibility
541 North Fairbanks Court, 14th Floor
Chicago, Illinois 60611-3314
Telephone: (312) 988-5297
Fax: (312) 988-5280 (preferred) or (312) 988-5491
E-Mail: stretchc@staff.abanet.org
Web site: http://www.abanet.org/lpm

Arizona
Diane M. Ellis, Director
Law Office Management Assistance Program
State Bar of Arizona
111 W. Monroe, Suite 1800
Phoenix, Arizona 85003-1742
Telephone: (602) 340-7313
Fax: (602) 716-9249
E-Mail: diane.ellis@staff.azbar.org
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Bristish Columbia
David J. Bilinsky, Practice Management Advisor
Practice and Ethics Advice
The Law Society of British Columbia
845 Cambie Street
Vancouver, British Columbia V6B 4Z9
Telephone: (604) 605-5331
Fax: (604) 646-5902
E-Mail: dbilinsky@lsbc.org
Web site: http://www.lsbc.org/services/frame_services_standards.html

Colorado
Reba J. Nance, Director
Law Practice Management and Risk Management
Colorado Bar Association
1900 Grant Street
Suite 950
Denver, CO 80202
Telephone: (303) 824-5320
Fax: (303) 894-0821
E-mail: reban@cobar.org
Web site: http://www.cobar.org

District of Columbia
Reid F. Trautz, Director
Law Practice Assistance Program
The District of Columbia Bar
Sixth Floor
1250 H Street N.W.
Washington, D.C. 20005-5937
Telephone: (202) 737-4700 ext. 212
Fax: (202) 824-1862
E-Mail: rtrautz@dcbar.org
Web site: http://www.dcbar.org

Florida
J. R. Phelps, Director
Law Office Management Assistance Service
The Florida Bar
650 Apalachee Parkway
Tallahassee, Florida 32399-2300
Telephone: (904) 561-5616
Fax: (904) 561-5825
E-Mail: jrphelps@flabar.org
Web site: http://www.flabar.org

Georgia
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E-Mail: natalie@gabar.org
Web site: http://www.gabar.org

Maryland
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Law Office Management
Maryland State Bar Association
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(800) 492-1964
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E-Mail: payevics@charm.net
Web Site: http://www.msba.org

Michigan
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State Bar of Michigan
306 Townsend Street
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Missouri
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Membership Services,Missouri Bar
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Jefferson City, Missouri 65102-0119
Telephone: (573) 635-4128
Fax: (573) 635-2811
E-Mail: lindao@mobar.org
Web site: http://www.mobar.org

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Fax: (518) 487-5694
E-Mail: sgallagher@nysba.org
Web site: http://www.nysba.org

New York (City)
Carol A. Seelig, Director
Small Law Firm Center
The Association of the Bar of the City of New York
42 W. 44th Street
3rd Floor
New York, NY 10036
Telephone: 212-382-4751
Fax: 212-382-4755
E-mail: cseelig@abcny.org
Web site: http://www.abcny.org

Oklahoma
James Calloway, Coordinator
Management Assistance Program
Oklahoma Bar Association
P.O. Box 53036
Oklahoma City, Oklahoma 73152
Telephone: (405) 416-7051
Fax: (405) 416-7001
E-Mail: jimc@okbar.org
Web site: http://www.okbar.org

Oregon
Barbara S. Fishleder, Director of
Loss Prevention
Oregon State Bar
Professional Liability Fund
Suite 201
5200 S.W. Meadows Road
P. O. Box 1600
Lake Oswego, Oregon 97035-0600
Telephone: (503) 639-6911
Fax: (503) 684-7250
E-Mail: Bfishleder@aol.com

Pennsylvania
Ellen Freedman
Law Practice Management Coordinator
Pennsylvania Bar Association
634 Meadowbrook Avenue
Ambler, PA 19002-4920
Telephone: 800/932-0311 x2228
Fax: 215-641-9728
Email: lawpractice@pabar.org
Web site: http://www.pa-bar.org

Pennsylvania (Allegheny County)
William R. Friedman
Director, Law Office Management Program
Allegheny County Bar Association
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Texas
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Washington
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Washington State Bar Association
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Seattle, WA 98121-2330
206-727-8237
206-727-8320
E-Mail: peter@wsba.org
Web site: http://www.wsba.org

Appendix 8 - List of Practice Management Resources for Advisors

Top 10 Essential Resources for Practice Advisors

1. ABA Law Practice Management Section: www.abanet.org/lpm; 312/988-5619
   Excellent resource for law practice management books, newsletters, and *Law Practice Management* magazine. Membership in the Section is also very helpful.

2. Lawyer's Weekly USA : www.lawyersweekly.com; 800/451-9998
   Newspaper published every other week with articles and cases of interest to lawyers

3. Law Office Computing: www.lawofficecomputing.com; 800/394-2626
   Computer magazine for legal professionals, published six times per year

4. *How to Start and Build a Law Practice* by Jay Foonberg
   An all-around helpful book published by the ABA; to order, call 800/285-2221

5. Law Technology News: www.lawtechnews.com; 212/545-6222
   A good way to keep up with new products and technology for the law office

6. Local Rules of Professional Conduct

7. ABA Publications Catalogue: 800/285-2221
   A catalogue of publications offered for sale by numerous entities of the ABA

8. ABA Journal: www.abanet.org; 800/285-2221
   A good way to keep up on the news of the legal profession, including law practice articles

9. National Law Journal: www.ljx.com/nlj; 800/888-8300
   Another good way to keep up with the legal profession; the "ljx.com" web site is also very informative

10. Local Resources, including the Law Practice Management Section or Committee of your bar association.