



CAN

Coach and Advisor Network

REP

Réseau d'encadrement de la pratique

2024

VOLUNTEER WELCOME PACKAGE



Law Society
of Ontario

Barreau
de l'Ontario



416-947-3315



coachandadvisor@lso.ca

WELCOME



HI THERE!

WELCOME TO THE LAW SOCIETY OF ONTARIO'S
COACH AND ADVISOR NETWORK (CAN)!

We are thrilled to have passionate and dedicated lawyers and paralegals like you join our esteemed community. Your commitment to giving back to the legal profession is commendable, and we believe your knowledge and experience will greatly contribute to the growth and development of fellow practitioners.

This welcome package covers

- An overview of your role as a Coach / Advisor
- How an engagement typically works
- Key considerations on how to manage your risk, and
- Links to resources to expand on these and other topics you may have questions on.

LET'S GET STARTED!

ACTING AS A CAN COACH



A Coach is an Ontario licensee who provides guidance to a Participant on the development of best practices and practice management skills. Coaching is an approach for managing change: moving an individual from where they are now to where they want to be. It is a conversation and a process that occurs over time, between the Coach (Volunteer) and the Participant (person being coached). As a Coach, your role extends beyond immediate problem-solving; you contribute to the longer-term advancement of your Participant's career by guiding them in the development of best practices and practice management skills.

COMMITMENT



Your 4-hour commitment as a Coach involves initiating the coaching relationship with a comprehensive 1.5-hour session with the Participant, laying the foundation for a focused and strategic approach. Following this initial meeting, you will engage in a series of five 30-minute sessions, often scheduled bi-weekly, creating a structured framework that spans approximately three months. This thoughtful and phased approach ensures a sustained commitment to the Participant's professional development, allowing for ongoing support and refinement of skills.

ACTING AS A CAN ADVISOR



An Advisor is an Ontario licensee, who is currently practicing law or providing legal services, with at least five years of practice experience. Advisors act as a sounding board, can assist in the identification of issues and options, and provide targeted guidance to other lawyers and paralegals seeking support on specific substantive or procedural issues within a client file. Unlike the longer-term commitment associated with coaching, Advisors offer more focused and immediate assistance on particular challenges or questions faced by Participants.

COMMITMENT



As an Advisor, you will be drawing from your extensive practice experience, and your role is characterized by the provision of up to 30 minutes of targeted assistance to lawyers and paralegals seeking immediate guidance on potentially complex fact scenarios, identifying key assumptions, and providing actionable suggestions for moving forward.

HOW AN ENGAGEMENT TYPICALLY WORKS

WHAT TO EXPECT

While each engagement will adhere to a common framework, Volunteers should recognize that each engagement is distinct and shaped by the specific request and topics under consideration.

1 PARTICIPANT REQUEST IS MADE TO CAN VIA ONLINE APPLICATION

Participant will indicate in their application whether they need time with either a Coach or Advisor and what topics, questions or concerns they would like to discuss.

2 CAN STAFF PROCESSES THE PARTICIPANT'S REQUEST

For Advisor requests, this involves determining what the substantive issue is. With Coach requests the CAN team will reach out to the Participant to clarify their goals and objectives, making sure they are in line with CAN's mandate.

3 CAN STAFF REACHES OUT TO VOLUNTEERS CANVASING FOR AVAILABILITY AND INTEREST

CAN will reach out to Volunteers by email. These emails will contain the nature of the question and/or goal(s) of the Participant. All relevant details are provided to the Volunteer at this time, enabling them to determine if they are comfortable assisting on the matter.

4 MATCH IS MADE

Once a Volunteer has confirmed their interest in taking a match BY WAY OF A REPLY EMAIL, CAN staff formally makes the connection. Both the Volunteer and Participant will get an email confirming the match and instruction with how to move forward. If Volunteers do not hear from the Participant, we encourage you to follow up. Note: Advisors should ensure they have time within the 2-3 days following the request to complete the engagement.

5 ENGAGEMENT WRAP-UP

A post-engagement survey will be sent to both you and the Participant. In the event you end your engagement earlier than planned, please take the time to notify CAN. A reminder: once you've met your commitment, you are not required to continue a relationship with the Participant.



KEY RISK MANAGEMENT ELEMENTS



Volunteers should appreciate they are engaging with other licensees, some of which have questions, concerns, and goals related to active practices and ongoing files. There are several risk management areas that all Volunteers should be aware of before and while engaging with Participants.

Participant's Judgement and Research

Discussions you have with the Participant should never replace the Participant's own judgement and research. Participants should independently satisfy themselves of any suggestions or recommendations put forward by the Volunteers. Remember, you are giving guidance, not legal advice. Volunteers should feel comfortable reminding Participants that they should be conducting any and all necessary research when deciding how to proceed.

Contact With Participant's Clients

Under no circumstances should a Volunteer find themselves in a position where they are engaging or interacting with a Participant's clients. Volunteers must ensure there is no risk of forming a lawyer/paralegal-client relationship.

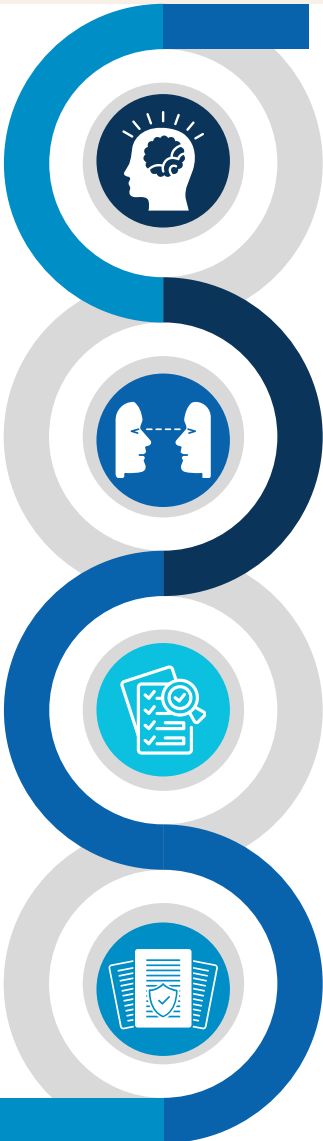
Conflicts Checking

While Participants are asked to identify licensees and firms to avoid in making a match, the duty to manage conflicts is ongoing, and everyone must be vigilant about compliance with the rules.

LawPro & Professional Liability Insurers

LAWPRO® is supportive of CAN Engagements. LAWPRO® has established criteria for these relationships that, if met, will result in a waiver of the deductible and Claims History Levy Surcharge if a claim arises from a match. CAN assists with documentation of the terms of the Coaching or Advising Engagement, which includes the limited scope of the Engagement, meeting LAWPRO®'s risk management criteria

Paralegals (other than those required to be insured under the LAWPRO® program) obtain their Errors and Omissions insurance from a variety of insurers. For more information on the availability of coverage with respect to their participation in CAN, paralegal CAN Volunteers may wish to contact their professional liability insurers.



TOOLS & RESOURCES

PLEASE TAKE A LOOK AT THE RESOURCES CAN HAS TO ASSIST YOU IN LEARNING ABOUT YOUR ROLE

COACHING

- [CAN Frequently Asked Questions](#)
- [Welcome to Coaching](#)
- [Preparing for Your Role as Coaching Participant](#)
- [Participant Pre-Contact Worksheet for Coaching](#)
- [Coaching Session Worksheet](#)
- [Report Back Worksheet for Coaching](#)
- [CPD Record for Coaching Participants](#)
- [Preparing for your Role as Coach](#)
- [GROW Template with Key Questions](#)

ADVISING

- [CAN Frequently Asked Questions](#)
- [Welcome to Advising](#)
- [Participant Pre-Call Worksheet for Advising](#)
- [CPD Record for Advising](#)

VIDEOS




- [What is Coaching](#)
- [Who is Your Participant?](#)
- [Why Coaching Now?](#)
- [The GROW Model](#)
- [Report Back: Starting the Next Coaching Session](#)
- [Setting Up the Final Session](#)
- [Taking Stock](#)



For more information on your professional obligations as a Volunteer, please visit our [Practice Management Considerations page](#).

HOW TO REACH US

Office Hours: M - F 9:00am - 5:00pm EST

 Email	coachandadvisor@lso.ca
 Phone	416-947-3315
 Website	https://lso.ca/lawyers/practice-supports-and-resources/coach-and-advisor-network



NEXT STEPS

COMPLETE THE CAN VOLUNTEER SURVEY AND
YOU'LL BE READY TO MATCH!



Keep your eyes open for emails regarding potential new engagements.



Note: Emails about Advisor or Coach requests are sent automatically through noreply@lso.ca and coachandadvisor@lso.ca. Please consider adding noreply@lso.ca and coachandadvisor@lso.ca to your safe sender email list to make sure you receive our communications.



Also please ensure that you let the CAN Team know of any status changes or events that may impact your availability or eligibility as a Volunteer.

Finally, please always remember, if you have any questions or concerns about any of the information in this welcome package, do not hesitate to reach out to the CAN Team to book a follow-up intake call.

Thank you!

The CAN Team