



**Law Society
of Saskatchewan**

Continuing Professional
Development

**Limited Scope Legal Services
Boot Camp
(CPD 323)**

March 29, 2022

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Zoom Meeting Access

Please use the following link to access the Boot Camp.

Limited Scope Legal Services Boot Camp Mar 29, 2022 | 09:00 AM – 12:30 PM Saskatchewan

Join Zoom Meeting

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- Go to <https://support.zoom.us/hc/en-us>.
 - [Audio and Video](#)
 - [Breakout Room Instructions](#)
- Email our CPD Administrator at cpd@lawsociety.sk.ca.
- Phone our CPD Administrator at 306-569-8232.
- Ask a question in the meeting chat.

PROGRAM - LIMITED SCOPE LEGAL SERVICES BOOT CAMP

March 29, 2022 | 9:00 AM – 12:30 PM SK

Virtual Zoom Meeting

This session is offered free of charge by the Law Society of Saskatchewan to support access to justice and is eligible for 3.0 Continuing Professional Development hours, all of which qualify for Ethics hours.

Overview

Traditionally, legal services have involved a comprehensive approach where lawyers represent a client from the beginning to the end of a matter, or the client passes on hiring services. But having a lawyer handle an entire case is not for everyone. Some individuals may not want or be able to afford this level of representation but may benefit from specific legal services ranging from appearances in court to drafting documents to managing particular aspects of a matter.

Limited scope (or unbundled) legal services is hiring a legal professional to handle only part of a case or do a specific task. Legal coaching is a type of unbundled legal service where a legal professional guides or coaches a client by providing strategies and tools to the client to prepare and present their case as effectively as possible. A legal coach remains behind the scenes while the client directly performs all tasks in the case.

Objectives

Join this half-day boot camp seminar to learn:

- the regulatory framework and practice for limited scope legal services;
- good practices and dealing with challenges that can arise in a limited scope service model;
- managing client expectations and interacting with clients and other legal professionals in a limited scope service model;
- lessons from research regarding limited scope services and how this model contributes to access to justice; and
- the business case for offering these types of services.

Presenters will include members of the judiciary, limited-scope practitioners, and experts who have been researching this topic.

Background Reading

- [The Nuts and Bolts of Unbundling](#) (*National Self-Represented Litigants Project*)
- [Unbundled Legal Services](#) (*British Columbia*)



9:00 Welcome and Overview of Limited Scope Legal Services

Welcome and overview of regulatory framework

Tim Brown, Q.C., Executive Director, Law Society of Saskatchewan. Regina.

Overview of Saskatchewan research on legal coaching and unbundled legal services

Brea Lowenberger, CREATE Justice. Saskatoon.

Perspectives from self-represented litigants

Dayna Cornwall, National Self-Represented Litigants Project. Toronto.

Perspectives from the Court

The Honourable Chief Judge S. Metivier, Provincial Court of Saskatchewan

The Honourable Chief Justice M. Popescul, Court of Queen's Bench

The Honourable Chief Justice R. Richards, Court of Appeal

10:00 Practitioner Experiences with Limited Scope Legal Services

Good practices in limited scope service delivery

Ontario and British Columbia

Lisa Eisen, Family Law: A La Carte. Toronto.

Matt Sims, Standpoint Decisions. Vancouver.

Saskatchewan

Tiffany Paulsen, Q.C. Robertson Stromberg LLP. Saskatoon.

Beau Atkins, Evolve Family Law. Saskatoon.

Carly Romanow, Pro Bono Law Saskatchewan. Regina.

11:00 Break

11:15 Court and Practitioner Experiences with Limited Scope Legal Services - Breakouts

Participants will join one of four breakout rooms, each with a host and lead discussants, to reflect on scenarios and issues that can arise in practice in the delivery of limited scope legal services. Participants are asked to raise issues and discuss how to effectively navigate and respond to challenges.

12:00 Lessons, Sharing and Wrap-Up

Julie Sobowale, Law Society of Saskatchewan. Regina.

Brea Lowenberger, CREATE Justice. Saskatoon.

Clair McCashin, Ministry of Justice. Regina.

Pamela Kovacs, Law Society of Saskatchewan. Regina.

Closing remarks from Provincial Court, the Court of Queen's Bench and the Court of Appeal

Chief Judge S. Metivier, Provincial Court of Saskatchewan

Chief Justice M. Popescul, Court of Queen's Bench

Chief Justice R. Richards, Court of Appeal

Final remarks and closing

Tim Brown, Q.C., Executive Director, Law Society of Saskatchewan. Regina.

12:30 Adjournment

Session 1 – 9:00 a.m.

Welcome and Overview of Limited Scope Legal Services

Tim Brown, Q.C., Executive Director of the Law Society of Saskatchewan, begins this session which gives an overview of Limited Scope Legal Services research, practice and court experiences from Saskatchewan and across the country.

Materials:

- [PowerPoint CPD 323 – Brea Lowenberger – Overview of SK Research](#)
- [PowerPoint CPD 323 – Dayna Cornwall - NSRLP](#)
- Representing Yourself Canada – Justices Speak Up:
<https://representingyourselfcanada.com/justices-speak-up-for-unbundling-the-video/>
- Representing Yourself Canada – Unbundling Myths:
<https://representingyourselfcanada.com/unbundling-unbundling-separating-the-myths-from-the-realities/>
- “Back to the Future of Legal Services” podcast, Woody Mosten, interview with Woody Mosten: <https://representingyourselfcanada.com/back-to-the-future-of-legal-services/>
- “Back to the Future of Legal Services” podcast, “My Lawyer, My Partner,” featuring lawyer, Renatta Austin: <https://representingyourselfcanada.com/my-lawyer-my-partner/>

ABOUT THE PRESENTERS



Tim Brown, Q.C., graduated from the College of Law, University of Saskatchewan, in 1991. He has been a lawyer in Saskatchewan for over 25 years. In 2011, he became Counsel with the Saskatchewan Lawyers’ Insurance Association (SLIA) and remained in that role until January of 2017, when he became Executive Director for the Law Society of Saskatchewan.



Brea Lowenberger is Saskatchewan's first Access to Justice Coordinator; Cofounder/Director of CREATE Justice, an action-oriented access to justice research centre at the University of Saskatchewan (U of S) that is working on transforming legal and justice services and the removal of systemic barriers to justice; and an adjunct law instructor for the award-winning Dean's Forum on Access to Justice and Dispute Resolution (Dean's Forum) course at the U of S.

She co-launched Saskatchewan's Legal Coaching and Unbundling Pilot Project (LCUP) in 2019, with working group partners from the

Law Society of Saskatchewan and Ministry of Justice. LCUP emerged in response to Saskatchewan lawyers' interest in the topic area and out of discussions at the 2013 and 2014 meetings of the Dean's Forum, which identified pathways for practicing lawyers to improve access to justice, with limited scope retainers – 'unbundling', a topic of that discussion. The working group is grateful to the Canadian Foundation for Legal Research for their support in conducting a research study associated with the pilot project, which Brea will report on at the session.

Dayna Cornwall holds degrees in English Literature, and Education, from the University of Windsor, and a Master of Library and Information Science degree from the University of Western Ontario. Dayna has worked previously in public and academic libraries, in education research, and in human resources, and brings a passion for access to information to the NSRLP.



Dayna coordinates the day-to-day and long-term objectives of the NSRLP, overseeing administration, information organization, and various special projects, including producing and co-hosting the NSRLP podcast, "Jumping Off the Ivory Tower". From 2018-2020 she is serving as the Project Lead on NSRLP's "Family Law at the Library" project, a pilot venture with local libraries to provide resources and legal information to family litigants through public libraries, as well as training on the SRL phenomenon for librarians. Dayna is interested in issues of information literacy, social justice, and feminism, is active in local theatre, and co-hosts and produces a podcast on women's history.



The Honourable Chief Judge

Shannon L. Metivier received her L.L.B. from the University of Saskatchewan in 1992 and was called to the Saskatchewan Bar in 1993. She practiced law as an associate and then as a partner at McKercher LLP in Saskatoon. While in private practice, she was a civil litigator with a wide-ranging practice and was actively involved in law firm administration.

Chief Judge Metivier was appointed to the Provincial Court of Saskatchewan on April 18, 2013. On March 1, 2021, she became the Chief Judge.

She has a special interest in the intersection of mental health and the justice system and currently serves as Chairperson of the Saskatchewan Review Board.

The Honourable Chief Justice

M.D. Popescul obtained a B.A. from the University of Regina in 1976 and an LL.B. from the University of Saskatchewan in 1979. He was called to the Saskatchewan Bar in 1980.

He was appointed Queen's Counsel (Canada) in 1992 and Queen's Counsel (Saskatchewan) in 2000. He served as a Bencher with the Law Society of Saskatchewan from 1998 to 2003 and was President in 2001. Chief Justice Popescul was appointed to the Court of Queen's Bench for Saskatchewan in 2006 and was appointed Chief Justice in 2012. He is resident in Saskatoon.



Chief Justice Popescul has previously presented at numerous legal education seminars and frequently at both the Bar Admission Course and the CPLED Program. He has also been on the Faculty of the Trial Advocacy Workshop for over 17 years. Chief Justice-Popescul was the recipient of SKLESI's Outstanding Volunteer Award (North) in 2005 and SKLESI's Award of Excellence for Legal Education Development in 2008. He is a member of the Canadian Judicial Council.



The Honourable Chief Justice

Robert G. Richards was appointed Chief Justice of the Court of Appeal for Saskatchewan on June 30, 2013. He was appointed to the Court of Appeal in 2004.

Chief Justice Richards completed a Bachelor of Laws from the University of Saskatchewan in 1979 and a Master of Laws from Harvard University in 1982. He was a Law Clerk, Supreme Court of Canada (1979-1980); Parliamentary Intern, House of Commons, Ottawa (1980-1981); associate lawyer with Gowling and Henderson, Ottawa (1982-1984); Chief of Staff to the Rt. Hon. Ramon

Hnatyshyn, Ottawa (1984-1985); Director of Constitutional Law, Saskatchewan Department of Justice, Regina (1985-1990); and a partner at MacPherson Leslie and Tyerman (1990-2004). He appeared as counsel in over 40 Supreme Court of Canada appeals.

Chief Justice Richards has been the Chair, Supreme Court of Canada – Canadian Bar Association Liaison Committee; Co-chair national Canadian Bar Association Constitutional and Human Rights Law section; Vice-chair and Council member of the International Commission of Jurists (Canadian Section); and a Director of the Canadian Institute for Advanced Legal Studies. He is a long-time lecturer and presenter at the College of Law, University of Saskatchewan and the Johnson Shoyama Graduate School of Public Policy, University of Regina.

Session 2 – 10:00 a.m.

Practitioner Experiences with Limited Scope Legal Services

*Good practices and challenges in limited scope service delivery:
Experiences from British Columbia and Ontario*

- **Lisa Eisen**, Family Law: A La Carte (Ontario) – 15 minutes
- **Matt Sims**, Standpoint Decisions (British Columbia) – 15 minutes

Experiences from Saskatchewan

- **Tiffany Paulsen, Q.C.**, Robertson Stromberg LLP – 10 minutes
- **Beau Atkins**, Evolve Family Law – 10 minutes
- **Carly Romanow**, Pro Bono Law Saskatchewan – 10 minutes

Materials:

- [PowerPoint – Matt Sims – The Unbundled Legal Services View from BC](#)
- [PowerPoint – Beau Atkins – Unbundled Differently](#)



Lisa Eisen was called to the Ontario Bar in 1995 and earned her Associate Certified Coach credential in 2013. She spent the early part of her legal career working as a facilitator of negotiation and mediation workshops across Canada and the Caribbean. Through that experience she became familiar with adult learning principles and continues that work providing legal coaching to clients and Legal Coach training to lawyers.

Lisa has been working as a family law lawyer for many years, representing clients at all stages of the process. In 2016, Lisa founded Family Law: A La Carte (FamilyLawALaCarte.ca) where she provides unbundled family law and legal coaching services to clients. Lisa served as an expert advisor on the design of a training program for legal coaches as part of a Law Foundation (Ontario) research project. Lisa has also participated in unbundling conferences and training programs in the United States (Denver & Chicago), and has spoken at a number of conferences and law schools about unbundling and legal coaching. She is a member of the Steering Committee of the Limited Scope Family Law Services Project (Ontario). Lisa now trains lawyer and legal professionals to provide legal coaching services to their clients (LegalCoachTraining.ca).

Matt Sims has worked across a wide range of sectors over the past 25 years, exploiting emerging technologies for performance improvements and competitive advantage for customers and clients around the world.

Expert communication and people skills enable him to quickly understand a project's objectives and challenges and immediately deliver value. He's worked with teams and projects across several continents in software development, design and media, and the telecom sectors. He has worked for Bell Canada in Toronto, Lucent Technologies in Vancouver, and more recently as an entrepreneur of several B2B startups.



When he's not reading up on business and technology, Matt is out there with his family having fun in and around Vancouver.



Tiffany Paulsen, Q.C. is a partner with Robertson Stromberg LLP in Saskatoon. She practises primarily in the area of family law. Tiffany has built an extremely successful practice in the areas of divorce, property division, custody, parenting, child and spousal support, adoption and child protection, surrogacy and assisted reproduction, pre-nuptial and cohabitation agreements.

In addition to negotiating, and litigating, family law disputes, Tiffany is also an experienced Arbitrator, Mediator, Parenting Coordinator, and collaboratively trained lawyer.

Tiffany has been selected by her peers to be included in the Best Lawyers in Canada 2015 – 2021. Further, in 2019, the Canadian Bar Association (Sask. Branch) bestowed upon Tiffany the Distinguished Service Award (the youngest lawyer to receive this award), recognizing Tiffany's contributions to the law in Saskatchewan and Canada. In 2012, Tiffany was named one of the "100 Most Distinguished Graduates" at the University of Saskatchewan College of Law Centennial Celebrations.

Beau Atkins is the founder of Evolve Family Law and one of its lawyers.

After his own frustrating journey navigating the family justice system, Beau leveraged technology and prioritized its weaving into all firm processes, law and business alike, to better serve both his clients and the public.

Beau's unapologetic push towards flat-rate billing and the unbundling of legal services further supports his efforts.

Bonus Fact: He speaks fluent Spanish.



Carly Romanow is the Executive Director for the Pro Bono Law Saskatchewan. Carly graduated from the University of Saskatchewan College of Law in 2014. Carly articulated and practiced in private practice until July of 2016 when she joined PBLs. Carly has been an active participant in pro bono services programs throughout law school and her career. She is an active member of the legal community and the local community, sitting on non-profit boards and volunteering with various organizations.

Carly loves comedy, politics, and spending as much time as possible with her family at the family farm.

Session 3 – 11:15 a.m.

Scenarios and Court and Practitioner Experiences with Limited Scope Legal Services – Breakout Rooms

Participants will join one of four breakout rooms below, each with a Facilitator and lead discussants, to reflect on scenarios and issues that can arise in practice in the delivery of limited scope legal services. Participants are asked to raise issues and discuss how to effectively navigate and respond to challenges. See [Zoom Instructions for Participating in Breakout Rooms](#).

Room	Facilitator	Discussion Leads	Rapporteur
Room 1	Chief Judge Metivier	Carly Romanow, Matt Sims	Julie Sobowale
Room 2	Chief Justice Popescul	Beau Atkins, Dayna Cornwall	Brea Lowenberger
Room 3	Chief Justice Richards	Lisa Eisen, Tiffany Paulsen, Q.C.	Pam Kovacs
Room 4	Tim Brown, Q.C.	Jody Martin, Valerie Payne	Clair McCashin

Breakouts will not be recorded. The following scenarios which identify issues or occurrences that can arise in limited scope legal service delivery will help guide our discussion, or feel free to share your own experiences, including challenges or good practices.

Guiding scenarios for appearing in court, communicating effectively, and ethical client-centered practice.

- Defining the scope of representation, including appearances (e.g., a client references “their lawyer” but the lawyer is not in court because of the scope of retainer);
- Clarifying communications between counsel and parties, including requirements for service of pleadings;
- Managing client expectations and communications vis-à-vis a limited scope retainer agreement;
- Understanding parameters for the legal professional’s role in document preparation, including disclosure of the lawyer’s assistance; and
- Facilitating withdrawals for limited representation and respect for the administration of justice (e.g., “lawyer shopping”).

Session 4 – 12:00 p.m.

Breakout Room Lessons, Sharing and Wrap-Up

Rapporteurs from each breakout room will share main elements of discussion and identify lessons, practical tips or recommendations for policy or practice that can support the effective delivery of limited scope legal services

- Room 1: **Julie Sobowale**, Law Society of Saskatchewan – 3 minutes
- Room 2: **Brea Lowenberger**, CREATE Justice – 3 minutes
- Room 3: **Pam Kovacs**, Law Society of Saskatchewan – 3 minutes
- Room 4: **Clair McCashin**, Ministry of Justice – 3 minutes

Closing remarks from the Provincial Court, the Court of Queen’s Bench, and the Court of Appeal

- **The Honourable Chief Judge S. Metivier**, Provincial Court of Saskatchewan – 3 minutes
- The Honourable Chief Justice M. Popescul, Court of Queen’s Bench – 3 minutes
- The Honourable Chief Justice R. Richards, Court of Appeal – 3 minutes

Final remarks and closing

Tim Brown, Q.C., Law Society of Saskatchewan – 5 minutes

Adjournment – 12:30 p.m.

Thank you for joining us today.

Below is a list of all materials for this seminar:

- [The Nuts and Bolts of Unbundling](#) (*National Self-Represented Litigants Project*)
- [Unbundled Legal Services](#) (*British Columbia*)
- [PowerPoint CPD 323 – Brea Lowenberger – Overview of SK Research](#)
- [PowerPoint CPD 323 – Dayna Cornwall - NSRLP](#)
- Representing Yourself Canada – Justices Speak Up:
<https://representingyourselfcanada.com/justices-speak-up-for-unbundling-the-video/>
- Representing Yourself Canada – Unbundling Myths:
<https://representingyourselfcanada.com/unbundling-unbundling-separating-the-myths-from-the-realities/>
- “Back to the Future of Legal Services” podcast, Woody Mosten, interview with Woody Mosten: <https://representingyourselfcanada.com/back-to-the-future-of-legal-services/>
- “Back to the Future of Legal Services” podcast, “My Lawyer, My Partner,” featuring lawyer, Renatta Austin: <https://representingyourselfcanada.com/my-lawyer-my-partner/>
- [PowerPoint – Matt Sims – The Unbundled Legal Services View from BC](#)
- [PowerPoint – Beau Atkins – Unbundled Differently](#)

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