

**[[Law Practice Management]]
Professor [[John S. Lowenthal]]
University of La Verne College of Law
[[Spring 2019]]
[[2 Units]]**

Professor

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Class Time and Place

Meeting days: Tuesday
Meeting time: 6:20pm – 8:30pm
Location: [room number]

Office Hours

Office Hours by arrangement, before or after class. Appointments may be requested via e-mail.

Course Description

a. Development of the various theories for practice management, which include the following:

- Creating industry specialty groups
- Creating practice groups
- Battleship management
- Eat what you kill management
- Fee for service
- Contingent fees

b. Nuts and Bolts for a Firm, which include the following:

- Time Keeping/Billing
- Client budgets
- Firm Operating Budgets
- Legal Recruiting
- Information & Technology Services (Modern Law office technology)
- Financial Resources and Reports
- Dealing with banks and getting operating capital
- Calendaring
- Collecting legal fees past due (management of AR)
- Calendaring/diary system
- Formation of the firm (LLP, corporation, etc.)
- Business licenses

- Health insurance
- Firm name
- Conflicts checks
- Legal research sources

c. Client Relationship Matters, which include the following:

- Communicating in the legal profession
- Fee Arrangements
- Ethical issues
- Common client complaints
- Marketing

d. Dealing With Other Lawyers, which includes the following:

- Civility in the Profession
- Ethical issues

e. Dealing With Associates and Partners, which includes the following:

- Performance Evaluation
- Use of law clerks and paralegals
- Partnership tracks
- Pro bono cases
- Continuing legal education
- Partnership agreement
- Plans for dissolution
- Retirement plans

INDIVIDUAL BUSINESS PLAN

Each student will prepare an Individual Business Plan, and meet at least once during the semester with the professor to discuss ideas for the plan. Content will be informed by the course coverage, and should include at a minimum discussion of the points raised in Munneke pp. 288-290.

TASK FORCE REPORT

The class will be divided into small groups to investigate and report on the topics: Accounting and Trust Account; Support Personnel; Office Space; Health insurance and other Benefits; Websites and Social Media; Computer Equipment; Time Keeping and Billing Programs; and Errors & Omission Insurance. The task forces will report to the class on their findings in 30 minute class sessions, using any presentation appropriate, including PowerPoint, and additionally prepare a handout that will be given to other members of the class.

Basis of Grade

Grading for the course will be determined on completion of an Individual Business Plan (60%), a Task Force Report (30%) and Class Participation (10%).

Assessment of the Individual Business Plan will include whether it addresses ideas developed in the course. It should be written, but there is no required minimum or maximum length. The type of practice should be disclosed, according to the rubric developed in the course. The Marketing Plan should relate to practice type, or at least explain why there is a deviation. Mockups of marketing material are acceptable. The Resources Plan and Financial Plan may include charts, as explained on p. 289 of Munneke. You may project or estimate where necessary.

Assessment of the Task Force Report will include how comprehensive it is (how well it covers the assigned task, 50%), presentation (whether the findings were effectively communicated, 25%) and handout quality (whether the handout appears to be a useful resource, 25%). Additionally, the class will be asked to assess each presentation, and class assessment will be aggregated and averaged for each Task Force; if the class assessment is within a standard deviation, it may influence grading.

Required and Suggested Materials

Required:

Munneke's Introduction to Law Practice: Organizing and Managing Legal Work, 4th

Author: Gary A. Munneke

ISBN: 9780314276452

Publication Date: 11/15/2012

ABA Standard 310

This course is designed to satisfy the requirements of ABA Standard 310. Standard 310 requires that for each hour of in-class time, students spend two hours preparing for class (reading or completing class assignments or assessments), and researching and writing the required paper.

Course Objectives

The objective is to enable new professionals to enter the legal workforce with an understanding of the issues confronting the working lawyer in private practice and how to navigate them successfully.

Course-Specific Learning Outcomes

LPM is designed to introduce students to the challenges and issues involved in establishing a law practice and managing a law office. We will review theory, examples, attitude, client relationships, and other practical problems, and explores how this relates to a successful practice. Students will learn to identify, analyze and demonstrate their understanding of both technical and practice-related issues and challenges in the practice of law.

Disability Accommodations Statement

Students with disabilities should refer to the policies described at the University of La Verne Disabled Student Services Handbook [as of September 13, 2017 located at <https://sites.laverne.edu/disabled-student-services/disabled-student-services-handbook/>, which can be found on the website of the University of La Verne Disabled Student Services website (<https://sites.laverne.edu/disabled-student-services/disabled-student-services-handbook/>) or at their office. Temporary accommodations are offered on a case by case basis. All required documentation must be submitted by the student before any formal accommodations and should be made directly to the Director of Student Affairs.

Any student eligible for and requesting academic accommodations due to a documented disability (or a suspected disability) is asked to contact the College of Law Director of Student Affairs and Americans with Disability Act Compliance Officer, Akita Mungaray by email at amungaray@laverne.edu or by phone at (909) 460-2017. Her office is located on the first floor of the College of Law, Office # 107. You can also contact Cynthia Denne at the University of La Verne Disabled Student Services office at (909) 448-4441. The office is located at the La Verne campus Health Center. In order to be considered for accommodations, disabilities must be documented and the proper medical evaluations must be submitted. The office is here to help you succeed in law school. Visit it online at <https://sites.laverne.edu/disabled-student-services/>.

Academic Integrity Policy

Assuming we have one passed by the time this goes out, it should go here.

Course-Specific Policies

ATTENDANCE AND TARDINESS

Attendance is mandatory. Students are required to arrive on time for class and stay for the duration of the session. Late arrivals and/or early departures without prior notice may result in the student being marked absent from the entire class. Please refer to the College of Law policy regarding absences in order to avoid being administratively dropped from the class.

CLASS PREPARATION

All students are expected to read the assigned materials prior to each class and come to class prepared to participate in a meaningful discussion of such materials. In accordance with the College of Law's mandatory briefing policy, all students are required to prepare written briefs (Key facts, Issue, Holding and Rationale) of any cases in the assigned reading materials. Unprepared students may be marked absent from the class.

LAPTOP POLICY

Students may use laptops in class unless it becomes a distraction for other students. Review or preparation of email or text messages is prohibited.

Reading Assignments

CLASS ONE (1/8)

Munneke Chap. 1; *The Business of Law*
California State Bar Act.
California Guidelines for Civility and Professionalism.
USDC Guidelines for Civility and Professionalism.

CLASS TWO (1/15)

Munneke Chap. 2; *The Marketplace for Legal Service*
Scheduling of individual meetings to discuss Personal Strategic Plan
Assignment of Task Forces
Accounting and Trust Account
Support Personnel
Office Space
Health insurance and other Benefits
Websites and Social Media
Computer Equipment
Time Keeping and Billing Programs
Errors & Omission Insurance

CLASS THREE (1/22)

Munneke Chapters 6, 16: *Strategic Planning and Marketing Legal Services*

CLASS FOUR (1/29)

Munneke Chapter 3: *Business or Profession?*

CLASS FIVE (2/05)

Munneke Chs. 4, 5: *The Truth About Law Firms, Managing the Practice of Law*

CLASS SIX (2/12)

Munneke Chap. 7; *Managing Clients*

CLASS SEVEN (2/23)

Munneke Chap. 8; *Managing Lawyers and Support Staff*

CLASS EIGHT (3/12)

Munneke Chap. 9; *Managing the Law Office*

CLASS NINE (3/19)

Munneke Chap. 10; *Managing Information and Technology Resources*

CLASS TEN (3/26)

Munneke Chap. 11; *Managing Financial Resources*

CLASS ELEVEN (4/02)

Munneke Chaps. 12 & 15; *Providing Excellent Services, Managing Your Professional Life*

CLASS TWELVE (4/9)

Munneke Chaps. 13 & 14; *Managing Substantive Law Practice Systems, Practice System Components*

CLASS THIRTEEN (4/16)

Reports from Task Forces (30 minutes each)
Accounting and Trust Account
Support Personnel
Office Space
Health insurance and other Benefits

CLASS FOURTEEN (4/23)

Individual Business Plan due
Reports from Task Forces (30 minutes each)
Websites and Social Media
Computer Equipment
Time Keeping and Billing Programs
Errors & Omission Insurance

Appendix of Mission, Values and Learning Outcomes

University of La Verne Mission and Values

It is the mission of the University of La Verne to provide opportunities for students to achieve their educational goals and become contributing citizens to the global community.

The University of La Verne shares four core values that promote a positive and rewarding life for its students through fostering a genuine appreciation and respect for:

1. **Values Orientation.** The University affirms a philosophy of life that actively supports peace with justice, the health of the planet and its people. Therefore, in light of this affirmation, it encourages students to become reflective about personal, professional, and societal values. It also encourages values-based ethical behavior.
2. **Community and Diversity.** The University promotes the goal of community within a context of diversity. Therefore, it encourages students to understand and appreciate the diversity of cultures that exists locally, nationally, and internationally. It also seeks to promote appreciation and preservation of biodiversity by helping students understand the impact/dependence of human beings on their environment.
3. **Lifelong Learning.** The University commits itself to promoting education that facilitates lifelong learning. Therefore, it teaches students how to learn, to think

- critically, to do constructive research, and to access and integrate information in order to prepare them for continued personal and career growth.
4. Community Service. The University believes that personal service is a primary goal of the educated person. Therefore, it encourages students to experience the responsibilities and rewards of serving the human and ecological community.

University of La Verne College of Law Vision, Mission, and Values

VISION

La Verne Law is an incubator for innovation in legal education, thought, and advocacy for individuals passionate about serving their communities and promoting access and justice.

MISSION

The mission of La Verne Law is to guide our students in the discovery of law and self as they prepare for the practice of law or other professional careers. Our faculty of scholars and teachers is committed to creating an innovative, collaborative learning environment designed to develop the knowledge and skills relevant to achieving individual and professional success.

Our mission encompasses educating, as well as enhancing the professional lives of, the members of the local, regional, national, and international communities we encounter – students, faculty, staff, administrators, alumni, members of the bench and bar, and others who pursue social justice.

Our mission is grounded in the core values of the University of La Verne – life-long learning, ethical reasoning and decision-making, diversity & inclusivity, and community & civic engagement.

Difference-making is our legacy.

CORE VALUES

University Values: As a College within the University of La Verne we adopt and endorse the University core values of Lifelong Learning, Diversity and Inclusivity, Community Engagement, and Ethical Reasoning.

College of Law Core Principles and Values: As an institution dedicated to teaching and training the next generation of lawyers and leaders, we operate institutionally and individually on the principles of professionalism, innovation, ethics, student centeredness and community enhancement. In our actions and interactions, we are and seek to be affirming, respectful, humble, accountable, committed, inclusive, empathetic, responsive, passionate, and positive.

University of La Verne College of Law Program Objectives

- A. Upon completion of the program of legal education, students will possess the skills and knowledge to enable them to pass any bar examination of their choosing.
- B. Upon completion of the program of legal education, students will possess those skills to participate as respected members of the legal profession.

C. Upon completion of the program of legal education, students will model ethical, responsible, and professional behavior.

D. Upon completion of the program of legal education, students will embrace cultural differences and civic and community engagement.

American Bar Association Standard 302: LEARNING OUTCOMES

A law school shall establish learning outcomes that shall, at a minimum, include competency in the following:

- (a) Knowledge and understanding of substantive and procedural law;
- (b) Legal analysis and reasoning, legal research, problem-solving, and written and oral communication in the legal context;
- (c) Exercise of proper professional and ethical responsibilities to clients and the legal system; and
- (d) Other professional skills needed for competent and ethical participation as a member of the legal profession.

In compliance with ABA Standard 302, the University of La Verne College of Law has established the following.

University of La Verne College of Law Program Learning Outcomes

1. Students shall demonstrate knowledge and understanding of substantive and procedural law.
2. Students shall demonstrate competence in legal analysis and reasoning.
3. Students shall demonstrate competence in conducting legal research.
4. Students shall demonstrate competence in problem-solving.
5. Students shall demonstrate competence in written and oral communication.
6. Students shall be able and motivated to exercise proper professional and ethical responsibilities to clients, the legal system, and the wider community.
7. Students shall demonstrate competent litigation skills.
8. Students shall demonstrate competent transactional skills.
9. Students shall apply cultural competency while exercising their legal skills.

10. Students shall demonstrate competence in answering bar-style multiple-choice, essay, and performance test questions.