

**BC Family Unbundled Legal Services Project
Unbundling Toolkit for Lawyers and Paralegals
List of Resources
Revised October 19, 2017**

1. Unbundling Project Final Reports:

- a. Final Report: www.mediatebc.com/unbundle
- b. Evaluation Report: www.mediatebc.com/unbundle

2. BC Law Society:

- a. Code of Professional Conduct: Unbundled lawyers must still comply with the entire Code. Sections 3.1, 3.2, 7.2-6 and 7.2-6.1 were amended to incorporate unbundling in 2013.
 - i. See separate document in the Toolkit listing all of these rules.
- b. Good summary of the revised rules (2013) in Benchers Bulletin Winter 2013: https://www.lawsociety.bc.ca/docs/bulletin/BB_2013-04-winter.pdf (pages 15 and 16)
- c. 2008 Task Force report: https://www.lawsociety.bc.ca/docs/publications/reports/LimitedRetainers_2008.pdf
- d. Risk management:
 - i. Unbundling: <https://www.lawsociety.bc.ca/support-and-resources-for-lawyers/lawyers-insurance-fund/risk-management/practice-management-risks-and-tips/limited-retainers,-unbundling/>
 - ii. ILA: <https://www.lawsociety.bc.ca/support-and-resources-for-lawyers/lawyers-insurance-fund/risk-management/practice-management-risks-and-tips/independent-legal-advice/>
 - iii. Annotated ILA checklist: <https://www.lawsociety.bc.ca/docs/practice/resources/checklist-ila.pdf>
- e. Retainer agreements, limited scope retainers and joint retainer letters: <https://www.lawsociety.bc.ca/support-and-resources-for-lawyers/law-office-administration/>
- f. President Crossin's blog posts Feb 26, 2016: <https://www.lawsociety.bc.ca/about-us/news-and-publications/president-s-blog/2016/unbundling-revisited/> and May 17 2016: <https://www.lawsociety.bc.ca/about-us/news-and-publications/president-s-blog/2016/limited-scope-retainers/>
- g. Benchers Bulletin:
 - i. June 2016 pages 11 – 13: https://www.lawsociety.bc.ca/docs/bulletin/BB_2016-02_Summer.pdf
 - ii. Fall 2017 page 6: https://www.lawsociety.bc.ca/Website/media/Shared/docs/bulletin/BB_2017-03-Fall.pdf?ext=.pdf
- h. President Crossin's letter to Mediate BC and Access to Justice BC supporting unbundling (dated December 15, 2016) – in the Toolkit.

3. **Access to Justice BC:** www.accesstojusticebc.ca/
 - a. Chief Justice Robert Bauman, "Invitation to Lawyers to Try Something New (Or Not So New)", November 15, 2016: <https://accesstojusticebc.ca/2016/11/invitation-to-lawyers-to-try-something-new-or-not-so-new/>
 - b. Chief Justice Robert Bauman, "Talk Doesn't Cook Rice", June 7, 2016: <https://accesstojusticebc.ca/2016/06/talk-doesnt-cook-rice/>

4. **Blog Posts / Articles:**
 - a. BC Law Institute:
 - i. Financing Litigation Project page: <https://www.bcli.org/project/financing-litigation-legal-research-project> (chapter 6)
 - ii. Financing Litigation Blog Series: <https://www.bcli.org/the-financing-litigation-series-exploring-options-to-pay-for-legal-services> (first post Oct 18 2017 is on Unbundled Legal Services)
 - iii. Excellent resource list for unbundling: <https://www.bcli.org/wordpress/wp-content/uploads/2017/10/Chapter-6-Unbundled-Legal-Services-List-of-Resources.pdf>
 - b. JP Boyd blog posts:
 - i. August 2014: <http://accesstojusticeincanada.blogspot.ca/2014/08/diy-4-unbundle-your-services-reinvent.html>
 - ii. Feb 2016: <http://www.slaw.ca/2016/02/05/diy-a2j-4-unbundle-your-services-reinvent-your-billing-model/>
 - iii. Feb 2016: <http://www.slaw.ca/2016/02/12/a2j-diy-5-provide-services-on-a-flat-rate-basis/>
 - c. Ron Smith: http://www.justfamilysolutions.ca/blog_details.php?bid=56
 - d. Sharon Silbert (Ontario):
 - i. <http://silbertfamilylaw.com/mediation-helping-divorced-parents-learn-to-work-together/>
 - ii. Lawyers Weekly July 2014: Unbundle to offer settlement-oriented services
 - e. The Lawyers Weekly Aug 19 2016 "Legal Woes Taking Toll, Report Says": <http://lawyersweekly.ca/articles/2824>
 - f. The Lawyers Weekly October 21, 2016, "Access to justice? Expert says there should be an app for that".
 - g. Jordan Furlong, "Rebundling the Law Firm", Law21 Blog post February 22, 2012: <http://www.law21.ca/2012/02/rebundling-the-law-firm/>
 - h. Slaw.ca:
 - i. Boyle, October 31, 2013: "Enhancing Access to Justice by Combining Unbundled Legal Services and Mediation": <http://www.slaw.ca/2013/10/31/enhancing-access-to-justice-by-combining-unbundled-legal-services-and-mediation/>
 - ii. Boyle, January 7, 2017: "Building an Unbundling Practice – Making it Practical": <http://www.slaw.ca/2017/01/06/building-an-unbundling-practice-making-it-practical/>

- iii. Russell, January 16, 2017: “Selling Unbundled Family Law Services? Know Your Market. Know Your Product”: <http://www.slw.ca/2017/01/16/selling-unbundled-family-law-services-know-your-market-know-your-product/>

5. National Self-Represented Litigants Project:

- a. Website: <https://representingyourselfcanada.com/>
- b. National Directory of Professionals Assisting SRLs: <https://representingyourselfcanada.com/national-directory/>
- c. Numerous very helpful blog posts including:
 - i. April 11, 2016: “Unbundling ‘unbundling’: Separating the Myths from the Realities”, <https://representingyourselfcanada.com/unbundling-unbundling-separating-the-myths-from-the-realities/>
 - ii. July 12, 2016: “Making it Legal: Some Simple Steps for Moving Unbundling to the Next Stage”: <https://representingyourselfcanada.com/making-it-legal-some-simple-steps-for-moving-unbundling-to-the-next-stage/>
- d. “Justices Speak Up for Unbundling – the Video”, judicial leaders across Canada (including Chief Justice Bauman) encourage lawyers to provide unbundled legal services: <https://representingyourselfcanada.com/justices-speak-up-for-unbundling-the-video/>

6. Webinars:

- a. Continuing Legal Education Society of BC:
 - i. June 12, 2014: Limited Scope Retainers, Practice Advice and Tips: www.youtube.com/watch?v=a---Zr8FuRc
 - ii. April 19, 2016 “A Bit of Counsel”: <http://www.cle.bc.ca/onlinestore/productdetails.aspx?cid=1267>
- b. Canadian Bar Association, BC Branch:
 - i. August 18, 2016: “Unbundling Demystified: Practical Tips from Lawyers Using It” http://www.cbapd.org/details_en.aspx?id=BC_unb0816r
 - ii. November 2, 2016: “Unbundling Part 2: The Tools to Make it Happen”, http://www.cbapd.org/details_en.aspx?id=BC_unb1116r
- c. Canadian Bar Association National:
 - i. March 29, 2017: “Made-To-Measure Legal Services: The Power of Limited Scope Retainers”, http://www.cbapd.org/details_en.aspx?id=NA_ona2j217
- d. Courthouse Library Society of BC:
 - i. December 1, 2017: “Unbundling Your Family Law Practice” <https://attendeegototraining.com/10r2h/register/7342258660629559298>

7. Alberta:

- a. Alberta Limited Legal Services Project: <http://www.albertalegalservices.com/> (includes a list of lawyers providing limited legal services)
- b. CBA Alberta Branch, “The Limited Scope Retainer”: http://albertalegalservices.com/project_resources/cba_alberta-

[limited scope retainers.pdf](#) (collection of helpful articles from practitioners and the court)

- c. Pro Bono Law Alberta Resource Bank has a great list of materials on “limited scope retainers” – you have to register: <http://www.pbla.ca/resourcebank/>
- d. CBA Alberta handbooks on limited scope retainers: <http://www.cba-alberta.org/Publications/Handbooks-and-Reports/Limited-Scope-Retainers.aspx>

8. Ontario:

- a. LawPro:
 - i. <http://www.practicepro.ca/practice/limitedscope.asp> (helpful list of tips, information and templates)
 - ii. Magazine article 2012: http://www.practicepro.ca/LawPROmag/Unbundled_Legal_Services.pdf
 - iii. LawPro’s Dan Pinnington has contributed may Slaw.ca posts on unbundling.
- b. LSUC webcast program held October 26, 2015: [“Unbundling Legal Services for Family Law Lawyers”](#)
- c. LSUC Jan 2015: <https://www.lsuc.on.ca/uploadedFiles/targeted-legal-services-bibliography.pdf>
- d. “Family Legal Services Review” December 31, 2016 (the Bonkalo Report): https://www.attorneygeneral.ius.gov.on.ca/english/about/pubs/family_legal_services_review/
- e. Nikki Gershbaum is preparing a comprehensive curriculum for unbundling and legal coaching: <https://representingyourselfcanada.com/legal-coaching/>
- f. Professor Martha Simmons at Osgoode is working on a second edition of her book on Mediation Advocacy which will feature a chapter on how lawyers can support clients in mediation using unbundled legal services.

9. Canadian Books:

- a. Furlong, “Law is a Buyer’s Market – Building a Client-first Law Firm”, 2017 Jordan Furlong
- b. Macfarlane, “The New Lawyer – How Clients are Transforming the Practice of Law”, second edition, 2017, UBC Press
- c. Barrie, “Journey to Justice – A Practical Guide to Effectively Representing Yourself in Court”, 2015, Denice Barrie
- d. Noel Semple, “Accessibility, Quality and Profitability for Personal Plight Law Firms: Hitting the Sweet Spot”, August 23, 2017, Chapter 4, free e-book published by the Canadian Bar Association: <http://www.cba.org/Publications-Resources/Resources/Futures/Accessibility-Quality-and-Profitability>

10. United States:

- a. Mosten and Scully, “Unbundled Legal Services, A Family Lawyer’s Guide”, 2017 American Bar Association

- b. Forrest S. Mosten (the father of unbundling), article:
http://www.mostenmediation.com/books/articles/Unbundled_Legal_Services_Today_and_Predictions.pdf
- c. PLI 3 hours FREE webinar on Limited Scope Retainers – Sue Talia (Excellent):
http://www.pli.edu/Content/Seminar/Expanding_Your_Practice_Using_Limited_Scope/_/N-4kZ1z12610?ID=235982
- d. Nov 4 2016 PLI webinar on ethical and practice challenges in unbundling:
https://www.pli.edu/Content/Seminar/Limited_Scope_Representation_2016_Ethical/_/N-4kZ1z11i7t?ID=259656
- e. Stephanie L. Kimbro:
 - i. “Limited Scope Legal Services – Unbundling and the Self-Help Client”, 2012 American Bar Association
 - ii. “Unbundled Legal Services – Risk Management Handouts of Lawyers Mutual”, June 2010: http://files.lawyersmutualinc.com/risk-management-resources/risk-management-handouts/avoiding-malpractice-traps/Unbundling_Legal_Services.pdf
 - iii. “Using Technology to Unbundle in the Legal Services Community”, Harvard Journal of Law and Technology, February 2013
https://papers.ssrn.com/sol3/papers.cfm?abstract_id=2233921
 - iv. “Offer unbundled Legal Services to Compete in Today’s Legal Market”, Sept 4, 2014 <https://lawyerist.com/now-trending-unbundling-legal-services/>
- f. Sam Glover, “The Shrinking Value of Legal Expertise and the Importance of Offering Unbundled Legal Services”: <https://lawyerist.com/the-shrinking-value-of-legal-expertise/>
- g. Alaska Bar (list of unbundled attorneys and “unbundled section”):
https://www.alaskabar.org/servlet/content/unbundled_law.html
- h. IAALS toolkits: <http://iaals.du.edu/honoring-families/projects/ensuring-access-family-justice-system/unbundling-legal-services>
- i. American Bar Association:
 - i. [Handbook on Limited Scope Legal Assistance 2003](#);
 - ii. Unbundling Fact Sheet:
http://www.americanbar.org/content/dam/aba/migrated/legalservices/delivery/downloads/20110331_unbundling_fact_sheet.authcheckdam.pdf
- j. Self-represented Litigant Network:
 - i. materials: <http://www.srln.org/taxonomy/term/174>
 - ii. resources 2016:
https://drive.google.com/file/d/0B8Ouep43fid_UDRjNHUzQINuVzA/view
 (includes information about Alaska model)
- k. IAALS/AFCC: <http://iaals.du.edu/honoring-families/projects/ensuring-access-family-justice-system/unbundling-legal-services>

11. Websites with interesting unbundled business models:

- a. www.thefamilylawcoach.com – Joel Miller, Ontario

- b. <http://www.familylawhelp.ca/coaching>
- c. <http://www.separation.ca/limited-retainers> - Andrew Feldstein, Ontario
- d. <http://familylawalacarte.ca/>
- e. <http://justicecafe.com/>
- f. www.legalyou.com
- g. www.avvo.com
- h. www.myontariodivorce.com
- i. <http://openlegalservices.org/>: Utah nonprofit law firm
- j. www.flatlaw.com: listing of lawyers providing legal services for flat fee
- k. <http://www.lethbridgedivorce.ca/flat-fee-pricing.html>
- l. For other examples see JP Boyd's Feb 2016 blog post above.
- m. <http://capitalcitylawnc.com/a-la-carte-legal-services/>
- n. Lucent Law PLLC – packaging legal services as products (video and slides here: <https://www.soundimmigration.com/packaging-legal-services-products-video/>)
- o. Self-Rep Navigators: <http://www.limitedscoperetainers.ca/>
- p. Alberta: www.lawondemand.ca
- q. Victoria BC: <http://www.legalcoach.ca/>

More to come!