

# Kankakee Community College Syllabus

**Course prefix and number: PLAS 1153**

**Course title: LAW OFFICE MANAGEMENT, Summer 2018**

**Credit hours/Length:    Lecture hours: 3    Clinical/Lab hours: None**

**Catalog description:** This course offers a realistic look at the law office environment. Practical information about client management, case files, confidentiality, deadlines, computer file access, billable hours, and more are covered.

The following are prerequisites:

1. Admission to the Paralegal/Legal Assistant Studies Program;
2. PLAS 1123 (Legal Research & Writing I) or Program Coordinator's consent.
3. PLAS 1133 (Legal Research & Writing II) may be taken concurrently with this course.

---

## Faculty

Dr. Kristine M. Condon  
Phone (815) 802-8216  
E-mail [kcondon@kcc.edu](mailto:kcondon@kcc.edu)  
[www.facebook.com/kccparalegal](http://www.facebook.com/kccparalegal)  
Department Phone (815) 802-8850

## Office Location/Office Hours

Location: Workforce Development Center, D116  
Office hours change weekly; please check my web site at  
[www.kcc.edu/facultysites/kcondon](http://www.kcc.edu/facultysites/kcondon)  
I will post my office hours on a weekly basis.

---

## Textbook(s) and Other Materials

- A. Nollkamper, Pamela Everett. Fundamentals of Law Office Management: Systems, Procedures, and Ethics, 5th edition. Delmar Cengage Learning, 2014.
- B. Please download Illinois' Rules of Professional Conduct from your LexisAdvance accounts or from the Illinois Supreme Court's website (the Court's website WILL be easier to navigate). We will need to reference Illinois-specific ethics rules throughout this course.
- C. Supplemental handouts and other materials will be distributed during class.
- D. Companion website: [www.cengagebrain.com](http://www.cengagebrain.com), then search for ISBN 9781133280842.

---

## Instructional Methods

Methods will include lectures, discussions, in-class and library research and writing projects, panel discussions, a field trip, and individual assignments and activities.

---

## Relationship to academic programs and transferability

Law Office Management was designed to meet specific student needs, either individually or within a program. Transferability of this course will be determined by each transfer institution. Please see an academic advisor for an explanation concerning transfer options. Refer to the IAI web page at [www.itransfer.org](http://www.itransfer.org) for more information.

---

## Course Goals and Learning Outcomes

At the conclusion of this course, you, the legal professional, will be able to:

1. Discuss the role of the paralegal in a variety of legal situations;
  2. Explain the various techniques for implementing systems to avoid legal malpractice;
  3. Define a variety of legal structures and determine how a paralegal would fit into those structures;
  4. Apply various techniques of law office administration, including billing techniques, to case scenarios in class, and apply appropriate time and records management techniques to case scenarios in class;
  5. Define the components of a well-stocked law library, apply these concepts to case scenarios in class, and determine whether the KCC law library is compliant with the approval guidelines of the American Bar Association;
  6. Discuss the growth of technology and telecommunications and illustrate their importance in the legal environment with a class demonstration;
  7. Discuss and clarify the ethics standards by which paralegals must abide and be able to apply these standards to a variety of scenarios in class;
  8. Employ effective communication skills through a variety of communications techniques;
  9. Discuss the various methods of professional development, including laying the foundation for a job search and career advancement;
  10. Comprehensively apply the concepts and objectives presented in class to a case study of the law firm or legal organization of your choice.
-

## Evaluation of Student Performance

See the Course Calendar and Homework Table for this session. Homework will generally be due at the start of a class period as noted in this syllabus. All homework is to be stapled, with your name on the top page, along with a description of the homework assigned. For example:

**John Smith  
PLAS 1153  
Review Problem 3  
Page 79**

In the case of homework assignments that are to be submitted electronically, file naming conventions are as follows:

**Chapter X Page X Yourname.file extension**

For example:

**Chapter 5 Page 46 John Smith.docx  
Chapter 8 Page 419 John Smith.xlsx**

**Homework that is not clearly labeled and stapled, or that fails to follow these naming convention guidelines, will be returned to the student ungraded without exception.**

Students are expected to submit homework on the evening it is due. The final homework grade will be reduced by 10% (1 letter grade) per class period until the homework is submitted. The exception to this rule is if you are absent on the date a homework assignment is due; in that case, the due date is automatically extended to the date you return for your next class without any reduction in points. All homework will be submitted in typewritten format (typewriter or PC acceptable) unless otherwise directed by the instructor.

The instructor reserves the right to alter or modify the content of an assignment or its position in the course calendar.

90-100% of total points possible = A  
80-89% of total points possible = B  
70-79% of total points possible = C  
60-69% of total points possible = D  
Under 60% of total points possible = F

The points will be apportioned as follows:

40% of final grade: Homework assignments, quizzes, and lab exercises.  
30% of final grade: Final Project.  
20% of final grade: Midterm Outline for Final Project.  
10% of final grade: Class attendance, punctuality, and substantive participation.

---

**Course Policies: Please review these carefully.**

You will be allowed a total of three absences for this semester. I reserve the right to inform you that your successful completion of the class is being jeopardized when you have missed your third class. I also reserve the right to request that you withdraw from the class with a grade of "W" when you have missed your fourth class. Each absence in excess of three will result in a one letter grade reduction of your final course grade.

Class will begin promptly; students are expected to be on time for class and are strongly encouraged to get notes from fellow students if they miss a class.

As is the case in all KCC computing labs and classrooms, no food, drink, or smoking is permitted. Children are also not permitted in the labs.

The Program's in-class examination policy is pursuant to Section 4.1 of the Code of Campus Affairs and Regulations, which states that "permission to make up work missed because of absence may be granted at the instructor's discretion." For in-class examinations, there are no makeups allowed for any reason except for illness, which must be documented with an original note explaining the absence which is signed by the treating physician. For final projects, the project is due on the assigned due date. **Final projects received after the due date will not be graded.** Students may not use notes, books, or reference materials on examinations unless specifically authorized to do so by the instructor. Students are to turn off all cell phones and pagers during an examination. Sending and receiving e-mails, instant or text messages, or other forms of electronic communication during the exam are strictly prohibited. Students are expected to be on time for exams and will not be given additional time to complete an exam due to a late arrival.

It is assumed that all course assignments and examinations represent the student's own efforts. Any impropriety, or appearance of impropriety, will result in a minimum of a "zero" for that assignment/examination and possible removal from the course. In addition, any student found copying software for personal use or altering settings on the computers (beyond the scope of any classroom assignment) will be removed from the course.

**Midterm and Final Project.** The midterm and the final projects for this course involve the creation of outlines and policy/procedure manuals integrating the content covered in the text with a law firm or other legal organization chosen by the student and approved by the instructor. Students will be expected to provide appropriate ALWD citation to each and every source used in the midterm outline and the final project and, by their enrollment in this course, understand the syllabus and Code of Conduct penalties for failure to provide an appropriate citation source.

**LexisAdvance Access.** Each student's KCC-based lexisadvance.com account is for academic use only. Any unauthorized use of such account to accumulate billable hours, to generate client fees, to provide work product for an internship site provider or individual authorized by statute or court rule to provide legal advice, or for any other income-producing use is strictly prohibited under the terms of the LexisAdvance Acceptable Use Policy; further, such use serves as grounds for immediate withdrawal from the course and possible sanctions under college policy.

In addition, all assignments shall be submitted with a cover sheet containing this statement regarding academic honesty:

**Because academic dishonesty fundamentally undermines the mission of KCC's PLAS Program and diminishes my individual efforts and those of my classmates, I certify that this work product is the result of my own independent and original effort; that I have completed this work product without the assistance of others unless otherwise directed by the instructor; and that I understand the syllabus's sanctions for work product meeting the definition of "impropriety or the appearance of impropriety."**

The cover sheet shall also contain the student's original signature.

---

## **College Policies**

### **Withdrawals**

When it is necessary to withdraw from a course or from the college, a student may do so on or before the withdrawal date stated on the syllabus without receiving a punitive final grade. Change of Schedule forms (used to add or drop a course) are available in Student Services, and the student should obtain the required signatures prior to submitting the Change of Schedule form to an adviser in Student Services. Students may submit Change of Schedule forms through the mail, but they must be postmarked no later than the withdrawal date. No withdrawals are allowed by phone. The last date to withdraw with a grade of "W" is five school days after the midpoint of the course pursuant to the Kankakee Community College catalog.

### **Code of Conduct**

By participating in this course, the student agrees to adhere to the KCC Code of Conduct, found in each academic year's catalog, and understands that his or her classroom behavior shall be in compliance with the Code.

### **Inclement Weather**

As a general rule, KCC will remain open during inclement weather. If the College will be closed due to inclement weather, cancellation announcements will be broadcast over Kankakee radio stations WKAN-AM, WBSW-FM, and WLRT-FM; Watseka stations WGFA-AM/FM; and Pontiac stations WJEZ-AM/FM. In addition, KCC reports campus closings at <http://www.emergencyclosings.com>.

### **Use of KCC Student E-mail Accounts**

To ensure a student's privacy under all applicable education laws and to facilitate timely interactions, two College-authorized methods of electronic communication exist: KCC-issued student email accounts (using the domain name of .student.kcc.edu) and the Canvas Learning Management System. Students are expected to regularly check their KCC email accounts and Canvas for important incoming communication from the college or from individual instructors. Students understand that emails they send from personal email accounts (other than those listed above) may not be delivered to the KCC recipient, and students should have no expectation that such messages will be answered.

### **Non-Attendance/Non-Participation**

KCC complies with state law and federal financial aid policy. If you receive an attendance grade of F or are institutionally withdrawn from a course, it will affect your eligibility for financial aid. (1) You must attend at least one class, or participate at least once for an online course (logging in without participation is not attending), by the 10th day of 16 week courses or within the first 10% of shorter term classes. Non-attendance will result in an attendance grade of F. (2) If you have excessive absences and no reasonable chance of passing the course at midterm (or after), your instructor may give you a WX grade and have you institutionally withdrawn from the course.

---

## College Resources

### Academic Skills Center

**Tutorial Assistance** – The center offers free tutorial services on a walk-in basis to support students enrolled at KCC in a wide range of college courses and individual skill development activities. The Learning Assistance Center, L338, is the location of most tutorial services.

**Learning Laboratory** – The Learning Lab, located in Room L329, uses instructional technology to provide individualized learning for students enrolled at KCC. In the lab, students can review and practice math, writing, reading, basic sciences, study skills, word processing, and other basic skills.

**Special Populations Services** – KCC offers advisement and special instructional support for students who are physically and learning disabled, as well as those with academic deficiencies. Students will receive appropriate academic instructional support, including preparatory courses, tutorial assistance, study skills assistance, and self-instructional programs. For special populations services, go to room L326.

---

### Syllabus Disclaimer

The course syllabus and calendar are subject to change.

---

### Copyright

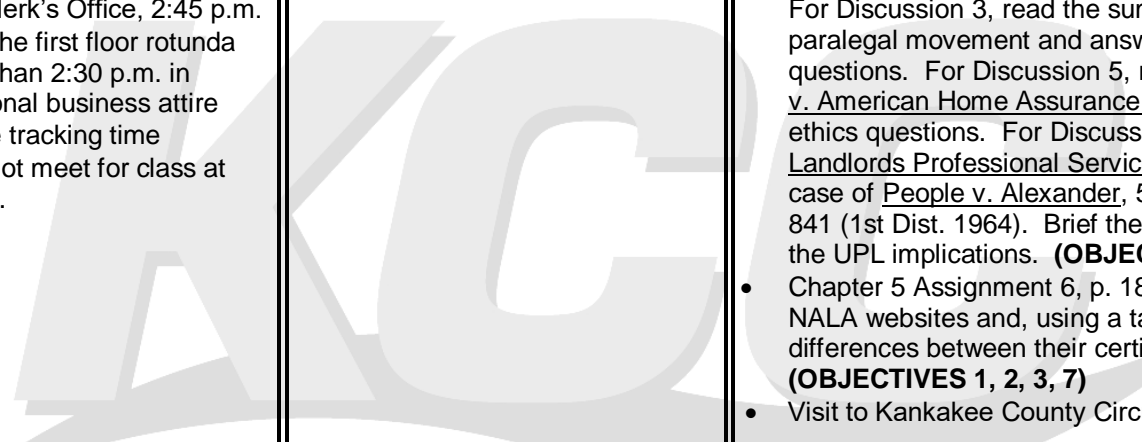
The materials on this course are only for the use of students enrolled in this course for purposes associated with this course. Further Information regarding KCC's copyright policy is available at <http://www.kcc-online.org/copyright/policy.html>.

Course Calendar Detailing Subject Coverage and Homework Table

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
<p><b>Week 1: Monday, 6/4/2018</b></p>	<ul style="list-style-type: none"> <li>• Introductions and review of course syllabus and expectations</li> <li>• Chapter 1, "The Legal Marketplace"</li> <li>• Discuss final project</li> <li>• Begin tracking time spent in and preparing for class for bill to instructor</li> </ul>	<p><b>Chapter 1, The Legal Marketplace</b></p> <ul style="list-style-type: none"> <li>A. Structure and Organization</li> <li>B. Private Law Firms</li> <li>C. Private Industry</li> <li>D. Government Agencies</li> <li>E. The Changing Marketplace</li> </ul>	<ul style="list-style-type: none"> <li>• Read and be ready to discuss Chapter 1 and related materials. <b>(OBJECTIVE 1)</b></li> </ul>
<p><b>Week 1: Wednesday, 6/6/2018</b></p>	<ul style="list-style-type: none"> <li>• Quiz covering Chapters 2 and 4</li> <li>• Chapter 2, "The Legal Team"</li> <li>• Chapter 4, "The Attorney-Client Relationship"</li> <li>• Continue tracking time</li> </ul>	<p><b>Chapter 2, The Legal Team</b></p> <ul style="list-style-type: none"> <li>A. Historical Perspective</li> <li>B. Legal Team Members</li> </ul> <p><b>Chapter 4, The Attorney-Client Relationship</b></p> <ul style="list-style-type: none"> <li>A. Variables Affecting Client Relations</li> <li>B. Cultivating Clients</li> <li>C. Media Advertising</li> <li>D. The Attorney-Client Relationship</li> <li>E. Attorney Discipline</li> </ul>	<ul style="list-style-type: none"> <li>• Written Assignment: One page, double-spaced paper answering the question: Why I want to be a paralegal. <b>(OBJECTIVE 7)</b></li> <li>• Quiz over Chapters 2 and 4, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>• Read and be ready to discuss Chapters 2 and 4 and any related handouts. <b>(OBJECTIVES 2, 7, 8)</b></li> <li>• Legal organization for final project to be selected by today's class.</li> </ul>
<p><b>Week 2: Monday, 6/11/2018</b></p>	<ul style="list-style-type: none"> <li>• Quiz covering Chapters 5 and 11</li> <li>• Chapter 5, "Paralegal Ethics and Client Relations"</li> <li>• Chapter 11, "Law Office Systems"</li> <li>• Continue tracking time</li> </ul>	<p><b>Chapter 5, Paralegal Ethics and Client Relations</b></p> <ul style="list-style-type: none"> <li>A. History of Paralegal Ethics</li> <li>B. Paralegal Ethics and Client Relations</li> <li>C. UPL</li> </ul> <p><b>Chapter 11, Law Office Systems</b></p> <ul style="list-style-type: none"> <li>A. Types of Systems</li> </ul>	<ul style="list-style-type: none"> <li>• Quiz covering Chapters 5 and 11, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>• Read and be ready to discuss Chapters 5 and 11 and any related handouts. <b>(OBJECTIVES 2, 7, 8)</b></li> <li>• Chapter 2, Example for Discussion 1, pp. 66-67. Review the scenario and answer the four questions, giving advice to this New York attorney.</li> </ul>

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
		B. Systems Development C. Systems Evolution D. Third-Party Systems	<ul style="list-style-type: none"> <li>Chapter 2, Assignments 3 and 8, p. 68. For Assignment 3, list the members of the firm, describing that person's duties and how he or she fits into the legal team. In Assignment 8, calculate the leverage ratio for the Smith, Jones &amp; Brown firm as shown using the formula on page 49. <b>(OBJECTIVES 3, 4, 8, 9)</b></li> <li>Chapter 4, Assignments 4 and 6, pp. 153-154. For Assignment 4, use the Illinois Attorney Registration and Disciplinary Commission web site to answer the question regarding the ethical violations, and include a copy of the complaint, Hearing Board report, or Review Board report with your answer. For Assignment 6, list each item mentioned in the problem set and, in two or three bullet points under each item, give me some idea of the policies that should be included under those bullet points. You do not have to write out actual full-page policies. Please put this assignment in a memo format from you to me. <b>(OBJECTIVE 7)</b></li> <li>Preparation of questions for Clerk's Office and alumni panel discussions.</li> </ul>
<b>Week 2: Wednesday, 6/13/2018</b>	<ul style="list-style-type: none"> <li>Quiz covering Chapters 12 and 13</li> <li>Chapter 12, "Docket Control Systems"</li> <li>Chapter 13, "File and Record Management"</li> </ul>	<b>Chapter 12, Docket Control Systems</b> A. Elements of a Docket Control System B. Calendaring Systems C. Tickler Systems D. Computerized Docketing Systems E. File Review System  <b>Chapter 13, File and Record Management</b> A. Filing Systems B. File Opening C. File Maintenance	<ul style="list-style-type: none"> <li>Quiz over Chapters 12 and 13, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>Read and be ready to discuss Chapters 12 and 13 and any related handouts. <b>(OBJECTIVES 2, 6, 7)</b></li> <li>Chapter 12 Assignment 3, pp. 412-413. <b>In-class</b> exercise calculating due dates, mail dates, and reminder dates. Instead of using the three-day federal rule regarding proof of service, comply with ILCS for proof of service. <b>(OBJECTIVES 2, 3, 4, 6)</b></li> </ul>



Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
		D. File Closing, Retention, and Destruction E. File and Records Management Ethics	
<b>Week 3: Monday, 6/18/2018</b>	<ul style="list-style-type: none"> <li>• Visit to Kankakee County Circuit Clerk's Office, 2:45 p.m.</li> <li>• Meet at the first floor rotunda no later than 2:30 p.m. in professional business attire</li> <li>• Continue tracking time</li> <li>• We will not meet for class at 5:30 p.m.</li> </ul>		<ul style="list-style-type: none"> <li>• Chapter 5 Examples for Discussion 3, 5, and 6, pp. 185-187. For Discussion 3, read the summary of the independent paralegal movement and answer the related ethics questions. For Discussion 5, read the summary of <u>DeVaux v. American Home Assurance Co.</u> and answer the related ethics questions. For Discussion 6, do not use <u>People v. Landlords Professional Services</u>. Instead, pull the Illinois case of <u>People v. Alexander</u>, 53 Ill. App. 2d 299, 202 N.E.2d 841 (1st Dist. 1964). Brief the case and be ready to discuss the UPL implications. <b>(OBJECTIVES 1, 2, 3, 7)</b></li> <li>• Chapter 5 Assignment 6, p. 187. Research the NFPA and NALA websites and, using a table, compare and contrast the differences between their certification processes. <b>(OBJECTIVES 1, 2, 3, 7)</b></li> <li>• Visit to Kankakee County Circuit Clerk's Office.</li> </ul>
<b>Week 3: Wednesday, 6/20/2018</b>	<ul style="list-style-type: none"> <li>• Quiz covering Chapters 3 and 14</li> <li>• Chapter 3, "Personnel Relations"</li> <li>• Chapter 14, "Law Library Organization and Management"</li> </ul>	<b>Chapter 3, Personnel Relations</b> A. Management Objectives and Employee Relations B. Employee Objectives and Management Relations C. The Team Approach  <b>Chapter 14, Law Library Organization and Management</b> A. The Nature of Law B. Classes and Authority of Law C. Law Library Organization and Procedures D. Law Library Technology	<ul style="list-style-type: none"> <li>• Quiz over Chapters 3 and 14, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>• Read and be ready to discuss Chapters 3 and 14 and any related handouts. <b>(OBJECTIVES 2, 4, 7)</b></li> </ul>

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
<b>Week 4: Monday, 6/25/2018</b>	<ul style="list-style-type: none"> <li>• Quiz covering Chapters 7 and 8</li> <li>• Chapter 7, "Timekeeping"</li> <li>• Chapter 8, "Billing and Financial Management"</li> <li>• Continue tracking time</li> </ul>	<p><b>Chapter 7, Timekeeping</b></p> <ul style="list-style-type: none"> <li>A. Timekeeping Requirements</li> <li>B. Timekeeping Records and Reports</li> <li>C. Elements of Timekeeping</li> <li>D. Timekeeping Systems</li> <li>E. Timekeeping Ethics</li> <li>F. Common Timekeeping Problems</li> <li>G. Timekeeping Tips</li> </ul> <p><b>Chapter 8, Billing and Financial Management</b></p> <ul style="list-style-type: none"> <li>A. The Art of Billing</li> <li>B. The Billing Process</li> <li>C. Billing Styles</li> <li>D. Collection</li> <li>E. Billing Ethics</li> <li>F. Financial Management</li> </ul>	<ul style="list-style-type: none"> <li>• Quiz over Chapters 7 and 8, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>• Read and be ready to discuss Chapters 7 and 8 and any related handouts. <b>(OBJECTIVES 2, 6, 7)</b></li> <li>• One-page, double-spaced report due detailing your observations and impressions of the Circuit Clerk's Office tour. <b>(OBJECTIVES 8, 9)</b></li> </ul>
<b>Week 4: Wednesday, 6/27/2018</b>	<ul style="list-style-type: none"> <li>• <b>LEX INDUCTION CEREMONY, 4:00 P.M., KANKAKEE COUNTY COURTHOUSE, COURTROOM 300. CHIEF JUDGE MICHAEL D. KRAMER WILL PRESIDE. ATTENDANCE IS NOT MANDATORY, BUT ENCOURAGED—YOU MIGHT BE IN NEXT YEAR'S INDUCTION CLASS!</b></li> <li>• Midterm project (outline) due. See midterm portion of syllabus for submission guidelines.</li> </ul>		
<b>Week 5: Monday, 7/2/2018</b>	<ul style="list-style-type: none"> <li>• Independent work in MML on library inventory</li> <li>• Continue tracking time</li> <li>• We will not meet for class at 5:30 p.m.</li> </ul>		<ul style="list-style-type: none"> <li>• Using ABA guidelines for compliance with library resources, determine whether KCC's Law Corner contains the necessary materials and is ABA-compliant. In a separate document, list any recommendations you may have for the purchase of additional materials, explaining whether they would be necessary for ABA reapproval or whether you as a paralegal student would find these materials to be useful. You may work in teams on this project. <b>(OBJECTIVES 5, 6)</b></li> <li>• Bill for your services for the month of June due. <b>(OBJECTIVES 1-9)</b></li> </ul>

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
			<ul style="list-style-type: none"> <li>Chapter 7, Assignments 1, 2, and 6, pp. 253-254. For Assignment 1, analyze Peggy McIntyre's timesheet as illustrated in the text and answer the questions. For Assignment 2, analyze the departmental management report shown in the text and answer the questions in the text about the fiscal condition of each department. For Assignment 6, use the Internet Resources section of the chapter to analyze three timekeeping products and summarize your findings in a memo to your instructor. <b>(OBJECTIVE 4)</b></li> <li>Chapter 8 Assignments 3, 5, 6, and 7, p. 286. For Assignment 3, research the law in Illinois (statutory, case, and/or Illinois State Bar Association ethics opinions) on the process for arbitrating fee disputes in Illinois. Use ALWD citation format. For Assignment 5, use the scenario in the text to calculate the firm's projected gross income for the year. For Assignment 6, calculate the firm's projected net income for the year. For Assignment 7, calculate each partner's projected income for the year. Put the calculations in an Excel spreadsheet. <b>(OBJECTIVE 4)</b></li> </ul>
<b>Week 5: Wednesday, 7/4/2018</b>	<ul style="list-style-type: none"> <li><b>NO CLASS—INDEPENDENCE DAY HOLIDAY.</b></li> </ul>		
<b>Week 6: Monday, 7/9/2018</b>	<ul style="list-style-type: none"> <li>Quiz covering Chapters 6 and 9</li> <li>Chapter 6, "Legal Fees"</li> <li>Chapter 9, "Managing the Client Funds Trust Account"</li> <li>Review of Illinois Rules of Professional Conduct re trust accounts</li> <li>Continue tracking time</li> </ul>	<p><b>Chapter 6, Legal Fees</b></p> <ul style="list-style-type: none"> <li>A. Historical Perspective</li> <li>B. Types of Fees</li> <li>C. Division of Fees</li> <li>D. Other Fees and Charges</li> <li>E. Statutory and Judicial Guidelines</li> <li>F. Fee Agreements</li> </ul> <p><b>Chapter 9, Managing the Client Funds Trust Account</b></p> <ul style="list-style-type: none"> <li>1. Types of Funds Held in the Trust Account</li> </ul>	<ul style="list-style-type: none"> <li>Quiz over Chapters 6 and 9, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>Read and be ready to discuss Chapters 6 and 9 and any related handouts. <b>(OBJECTIVES 2, 6, 7)</b></li> <li>Presentation of library inventory findings. <b>(OBJECTIVES 5, 6)</b></li> </ul>

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
		2. Maintaining the Trust Account 3. Interest on Lawyers' Client Funds Trust Account 4. Trust Account Abuses	
<b>Week 6: Wednesday, 7/11/2018</b>	<ul style="list-style-type: none"> <li>Alumni panel discussion</li> </ul>		<ul style="list-style-type: none"> <li>Chapter 6 Assignments 2, 3, and 4, p. 226. For the contingency fee agreement, fee agreement with nonrefundable chargeable retainer (which we call an advance payment), and refundable chargeable retainer (which we call a security retainer) with flat fee, use West's Illinois Forms, the companion website, LexisAdvance, or a similar source in the MML to locate a document for your policy manual. <b>(OBJECTIVES 4, 5, 7, 8)</b></li> <li>Chapter 9 Assignments 1, 2, and 3, pp. 309-310. For Assignment 1, use Microsoft Excel to create a ledger sheet for Lila Peterson, using the example in the text as your template. For Assignment 2, use LexisAdvance to download the appropriate Illinois Rules of Professional Conduct dealing with trust accounts and provide a one-page, double-spaced summary of the rules' contents. For Assignment 3, use the Illinois Attorney Registration and Disciplinary Commission web site to answer the question regarding the ethical violations, and include a copy of the complaint, Hearing Board report, or Review Board report with your answer. The matter should be no more than six months old. <b>(OBJECTIVE 4)</b></li> <li>Panel discussion with alumni of the Paralegal/Legal Assistant Studies Program. Opportunity for individual questions and answers to follow the session. <b>(OBJECTIVES 1 THROUGH 9)</b></li> </ul>

Class Date	In-Class Activity (Each Class is 2.5 Hours in Length)	Subject Matter Outline	Evaluation Tool(s) and Competency of Course Objective(s) Evaluated
<b>Week 7: Monday, 7/16/2018</b>	<ul style="list-style-type: none"> <li>Quiz covering Chapter 10</li> <li>Chapter 10, "Technology in the Law Office"</li> <li>Continue tracking time</li> </ul>	<b>Chapter 10, Technology in the Law Office</b> A. Common Law Office Software B. The Internet C. Intranets and Extranets D. Electronic Mail E. Technology Ethics F. Other Technologies	<ul style="list-style-type: none"> <li>Quiz over Chapter 10, designed to test your basic knowledge and comprehension of the concepts presented in the chapter. <b>(OBJECTIVES 1 THROUGH 9)</b></li> <li>Read and be ready to discuss Chapter 10 and any related handouts. <b>(OBJECTIVES 2, 6, 7)</b></li> </ul>
<b>Week 7: Wednesday, 7/18/2018</b>	<ul style="list-style-type: none"> <li>Strategic Planning: PLAS Program SWOT Analysis</li> <li>Open lab time to work on final project</li> </ul>		<ul style="list-style-type: none"> <li>Chapter 10 Examples for Discussion 4, p. 348. In Example 4, read the hypothetical and defend your answers regarding the firing of Joseph and the employer's right to monitor employee e-mails. <b>(OBJECTIVES 6, 7)</b></li> <li>Chapter 10 Assignments 3 and 5, pp. 348-349. For Assignment 3, research the technological ethics about cyberspace as they apply to Illinois. For Assignment 5, use the website evaluation worksheet to evaluate your law firm and prepare a report for the instructor as noted. <b>(OBJECTIVES 6, 7)</b></li> <li>One-page, double-spaced report due detailing your observations and impressions of the paralegal alumni panel and their office environments. <b>(OBJECTIVES 8, 9)</b></li> </ul>
<b>Week 8: Monday, 7/23/2018</b>	<ul style="list-style-type: none"> <li><b>FINAL PROJECTS DUE</b></li> <li>Final projects presented to class and alumni review panel</li> </ul>		<ul style="list-style-type: none"> <li>Final projects presented to class and alumni review panel. <b>(OBJECTIVE 10)</b></li> </ul>

**KANKAKEE COMMUNITY COLLEGE  
KANKAKEE, ILLINOIS**

**PLAS 1153: LAW OFFICE MANAGEMENT  
GUIDELINES FOR MIDTERM AND FINAL PROJECT**

Assume that you are a paralegal manager for a law firm. (You should pick a real-life law firm that has a web presence to provide you with baseline information about its legal environment.) Your firm has just hired a dozen top-notch paralegals from the Kankakee Community College Paralegal/Legal Assistant Studies Program. Though you have personal experience with this program, know that it is ABA-approved, and are aware that it trains only the best paralegals, you also know that starting a new job means you have to learn everything about your new job environment—from how to bill hours to where the pencil sharpener is. You have received a memo from the managing partner asking you to create a comprehensive policy and procedure manual for these new paralegals.

Your midterm project will be to build an outline for this policy and procedures manual; your final project will be to create the manual and present it to a panel of alumni for critique and peer review.

**MIDTERM PROJECT**

**Due Wednesday, June 27, 2018**

**Worth 100 Points; 20% of Final Course Grade**

**Document may be submitted electronically (KCC e-mail or Canvas).**

The midterm is essentially an outline of the final project. Your outline will need to include the following sections, and they should be labeled as follows:

- **Section 1, History and Management:** Include the history of the firm, its practice areas, and its management structure. This section should also include your best attempt at an organization chart showing where you fit into the hierarchy and a sample paralegal job description, along with citations to the exact sources you have used.
- **Section 2, Ethics:** Content on the ethical guidelines that bind you as a paralegal and your attorney, including specific materials on UPL, and citations to the exact sources you have used.
- **Section 3, HR Info:** Content on human resources/employee information, including emergency contact forms, sick day and vacation day forms, and personnel evaluation forms that you have downloaded from the web, along with citations to the exact sources you have used.
- **Section 4, Fees:** Content on the various types of fee structures available and samples of fee agreements that you have downloaded from the web, along with citations to the exact sources you have used.
- **Section 5, Time and Billing:** Content on timekeeping and billing, including timesheets, costs advanced slips, and sample bills that you have downloaded from the web, along with citations to the exact sources you have used.
- **Section 6, New Client Matters:** Content on client matters, including new client intake forms, trust account forms, tickler records, case coversheets, and file indexes, including samples that you have downloaded from the web, along with citations to the exact sources you have used.
- **Section 7, Technology:** Content on e-mail etiquette, cloud computing, software applications, and your firm's policy on signature blocks, including samples that you have downloaded from the web, along with citations to the exact sources you have used.

- **Section 8, Case Management:** Content on your firm's docket control, conflicts checking, and calendaring system and file or records management procedures, including samples that you have downloaded from the web, along with citations to the exact sources you have used.
- **Section 9, Library:** Content on your firm's law library holdings, along with citations to the exact sources you have used.
- **Section 10, Marketing:** Content on firm advertising, including samples that you have downloaded from the web, along with citations to the exact sources you have used.

Grading criteria include:

- Layout of outline, including how professionally the material is presented;
- How thoroughly the content is covered in the outline and complete documentation of all your sources used;
- Mechanics, including proper composition, grammar, spelling, and punctuation;
- Creativity, meaning how original you were in devising other content areas besides the ones provided here.

You will note that documentation of sources is a critical part of this project. It is understood that the legal profession has significant boilerplate documentation; however, for you to lift that content from our text, the web site, or from a former class participant without a) permission and b) attribution is actionable under the Code of Conduct and student affairs regulations.

## **FINAL PROJECT**

**Due Monday, July 23, 2018**

**Worth 300 Points; 30% of Final Course Grade**

On the last night of class, our alumni panel will return to critique your policy and procedures manual. You will be expected to make a brief (5 minute) presentation to the class, explaining why you constructed the manual as you did. Your colleagues will provide you with useful, anonymous feedback, and the alumni who return for the evening will offer their comments and suggestions as well. This feedback will be returned to you along with my feedback once your manual is graded.

Be advised of the following:

1. If you are late arriving for the exam, you will not be admitted to the examination room.
2. Late submissions of a final exam will receive an automatic zero under the college catalog; instructors are not mandated to accept final exams after the final grading period has passed. This policy will be strictly enforced.

Grading criteria include:

- Layout and construction of manual;
- Content of manual, including how well the outline matches the content presented;
- Mechanics, including proper composition, grammar, spelling, and punctuation;
- Creativity, meaning how original you were in synthesizing information from other sources and how you devised forms and procedures when other resources were unavailable.

**Please return your midterm outline with your final project.** As always, call, e-mail, or stop by with questions. Good luck! You're hired!

**Midterm Project: Policy and Procedure Manual Outline  
Grading Criteria (100 points)**

	<b>Beginning</b>	<b>Developing</b>	<b>Accomplished</b>	<b>Exemplary</b>	<b>Score</b>
<b>Outline Layout</b>	Disorganized, with proposed policies and procedures not following any sequence in the outline (0 points)	Some organization, but basically a first draft of an outline (10 points)	Evidence of organization; minor adjustments needed to make the outline exemplary (20 points)	Exceptional organization; events and procedures logically organized; clear sense of beginning, middle, and end (30 points)	<b>/30</b>
<b>Coverage of Content</b>	Unable to locate specific procedures, or required procedures are not included (0 points)	Procedures are first drafts and incomplete or have interim steps missing (10 points)	Content is adequately covered and will need minor adjustments to take it to the next level (20 points)	All content is exceptionally well covered, with evidence of extra effort to cover procedures not specified by the instructor (30 points)	<b>/30</b>
<b>Mechanics</b>	Frequent errors in composition, grammar, and/or spelling (0 points)	More than two errors in composition, grammar, and/or spelling (5 points)	One to two errors in composition, grammar, and/or spelling (10 points)	Error-free (15 points)	<b>/15</b>
<b>Creativity</b>	Outline has literally been constructed from guidelines distributed with midterm (0 points)	Minimal additions to base content provided with midterm (5 points)	Several additions to base content provided with midterm (15 points)	Substantial additions to base content provided with midterm (25 points)	<b>/25</b>
	<b>Total</b>				<b>/100</b>



**Final Project: Policy and Procedure Manual  
Grading Criteria (300 points)**

	<b>Beginning</b>	<b>Developing</b>	<b>Accomplished</b>	<b>Exemplary</b>	<b>Score</b>
<b>Layout of Manual</b>	Disorganized, with proposed policies and procedures not following the sequence of the outline (45 points)	Some organization, but basically a first draft of a manual from an outline (55 points)	Evidence of organization; minor layout adjustments needed to make the manual exemplary (65 points)	Exceptional organization; events and procedures logically organized; clear sense of beginning, middle, and end (75 points)	<b>/75</b>
<b>Coverage of Content</b>	Unable to locate specific procedures, or required procedures are not included (55 points)	Procedures are first drafts and incomplete or have interim steps missing (70 points)	Content is adequately covered and will need minor adjustments to take it to the next level (85 points)	All content is exceptionally well covered, with evidence of extra effort to cover procedures not specified by the instructor (100 points)	<b>/100</b>
<b>Mechanics</b>	Frequent errors in composition, grammar, and/or spelling (25 points)	More than two errors in composition, grammar, and/or spelling (35 points)	One to two errors in composition, grammar, and/or spelling (45 points)	Error-free (50 points)	<b>/50</b>
<b>Creativity</b>	Manual has literally been constructed from guidelines distributed with midterm (45 points)	Minimal additions to base content provided with midterm (55 points)	Several additions to base content provided with midterm (65 points)	Substantial additions to base content provided with midterm (75 points)	<b>/75</b>
	<b>Total</b>				<b>/300</b>

## Dress Policy for KCC Field Trips

Because “field trips” such as our excursion to the Kankakee County Courthouse may be the first time many attorneys have seen us as a group, we must remember that we are ambassadors of the College and the PLAS Program, and we are expected to dress as such for these class activities. This dress policy also shows respect for the bench. We do not want you confused for some of the individuals the judges otherwise see in the courtroom. . . . In short, if it’s not on this list, you may not wear it.

### Permissible Attire—Men

1. Dress pants
2. Cotton Dockers (no cargo pants)
3. Open-collared sport shirts (ties are not necessary for this event, but are certainly acceptable)
4. Dress shoes or loafers (no flip-flops; no socks is NOT an option)

### Permissible Attire—Women

1. Dress pants
2. Dresses (no sundresses)
3. Skirts and blouses or nice sweaters
4. Dress shoes or dress flats (NO flip-flops; hosiery is REQUIRED)

In addition, court orders prohibit 1) any kind of electronic devices in the courthouse and 2) any kind of hats in the courthouse. Leave them both in the car.

Have your notebook or a portfolio ready to take notes or to include thoughts for your policy and procedure manual. Ask questions and learn!

This tour is being offered by The Honorable Sandra Cianci, Clerk of the Circuit Court of Kankakee County, Illinois, and her staff.