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# Team Agreement for TEAM D

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| Course Title | PLEG140 – Law Office Management and Technology |

## Team Members/Contact Information

## Name Email Address

## 1. Shaunina Young B00576083@bryantstratton.edu

## 2. Jessica Warren- Fowler B00571647@bryantstratton.edu

## 3. Stephanie Turk B00571223@bryantstratton.edu

**4.** **Reba Thiesse B00584715@bryantstratton.edu**

## 5. April Welling [B00582668@bryantstratton.edu](mailto:B00582668@bryantstratton.edu) 315-529-0024

## 6.

## Team Ground Rules and Guidelines What are the general expectations for all members of the team?

## All team members participate on the project, Teams members must stay in contact with each other through email and/or on the discussion forum. Teams members must put for a great effort on each project.

Communication is the key and everyone’s opinions are valuable. Be open minded and compromise!

You can always ask for help if you do not understand something.

My expectations would be that everyone participates and gets what they need done on time, and that everyone is understanding with each other’s ideas and questions.

Everyone needs to be involved in our group and work together to complete the project.

## To participate with the other members and contribute accordingly

## Expectations for Time Management and Involvement

(Participation, communication with the team, accessibility, meeting times, etc.)

1.Team members must check in at least “once” a day.

2.Team members should check the Team discussion forum and email.

3.Team members must put for a great effort on each project.

Shaunina - If you are thinking about using the telephone for group meet, I will not be able to because I am Deaf. My sole communication is text messaging and emailing.

It is important for team members to check in, I agree with the idea of everyday, to check and see what needs to be done or discussed.

Everyone needs to communicate with one another to get things done. I feel that we should be communicating several times throughout the week. We should set up a time at least once a week we all can get together and discuss how we feel so far on the project and any ideas we may have but also so we can make sure everyone is on the same page and all working together.

I agree with the answer below. I know we all have different schedules and lives to tend to and understand it can be difficult but I am sure we can come up with something. Personally, I prefer actually speaking on conference call or video chat when communicating but I am down for whatever everyone decides. I added my cell number next to my email. Anyone please feel free to reach out to me. Text me first to let me know who you are so I don’t assume you are a spam caller.

**Ensuring Fair and Even Contribution and Collaboration**

What strategy will you use to ensure that all team members are contributing and collaborating appropriately? Describe the communication strategy you will use if a team member is not contributing and collaborating effectively. How will the team manage conflicts between team members?

I think that if this is a particular person who just refuse to do their part. All of us who wants to participate we come together and work on that particular person part of the project and let it be known.

If you are not able to participate in the group discussions, the team member must email their work/answers in a timely manner.

I believe a big way to help with conflict with team members is communication with everyone to get it done.

To ensure that every team member is contributing I feel that everyone should be communicating with each other. If someone is unsure how to communicate through certain things like the discussion and or email they need to try and get a hold of the rest of the group somehow and we all could work together to figure something else out. Communication is key we can’t work as a team if we aren’t all trying.

Indeed. I have been stuck working crazy hours and had a really hard time trying to figure out all this. It is unfair to the rest of you, but unfortunately, I work in healthcare and the last two weeks have been hell. Things slowed down today, so I am hoping it will stay that way. Please let me know what I can do to get caught up with all of you.

## Special Considerations

What do you, as a team, agree will make this team experience different from past team experiences?

The fact that we are not in front of each other and the way we communicate is all via the internet. We have really no knowledge of each other or each other weakness or strengths.

I feel that if we all communicate and pick a time each week that may work for all of us and have a conversation whether it be on the phone or video chat or just the group discussion we all need to make sure to keep in touch. Also using one drive (email) and putting notes on documents and ideas we might have will help. I just feel a big part of this is working together and communicating with one another.

Again, I feel phone or video are the best way to communicate but it is whatever is easiest for everyone.

**Part 1 -**

Hidden Figures, LLC, is a medium-sized Criminal Defense law firm that was established in 1999. The law firm is in New York City. Our firm specializes in providing defense to people charged with criminal activity. The firm consists of some of New York City's top attorneys all of which have been part of the law firm since it first opened its doors.

Our firm is unlike a limited liability firm and/or a professional corporation. In a limited liability firm, the partners are not personally liable for the debt and/or malpractice of the other partners. In a professional corporation that is like a shareholder business in which the attorney’s share in the profits and loss of the firm. Hidden Figures, LLC, is a partnership law firm. A partnership firm consist of two or more partners. The partners are responsible for the debt and/or malpractice of the other partners.

**Part 2 -**

**Two equity partners:** Verna Hobbs (**Managing Partner**) and Delores Starkey – An equity partners’ job is to buy into the business and to receive a cut of the business’ profit later (Olling, 2020).

**One non-equity partner:** Teyana Star - A law firm employee who has been promoted from associate to a tier of partnership. It is often a transitional step in the direction of becoming a full equity partner (Serrill-Robins, 2010).

**Three associate attorneys:** Tynisha Tailor, Taliah Chell and Korina Key - Associate attorneys are early career lawyers who work for law firms to earn experience and master their skills. An associate attorney’s job is to negotiate with associates from other law firms, partake in jury selection, and help argue cases in court. (ZipRecuiter, n.d.).

**One legal administrator:** Tiara Williams - A legal administrator is responsible for managing all facets of running a law firm and/or a legal department. A legal administrator’s duty is to supervise budget and payroll operations, handle office space arrangements, collect supplies and administer other clerical employees in the legal department (study.com, 2020).

**Two Paralegals:** Michael Scott and Dwight Schrute. Paralegals are a very important part of the legal team. They work directly under the supervising attorney and are bound to uphold the standards and ethics. Some duties performed are: preparing legal documents, contracts, briefs, meeting and communicating with clients (do not and cannot give legal advice), prepare attorney for court, interview witnesses, prepare evidence and exhibits, conduct legal research, and draft motions. Depending on the law office type, the duties may vary. (nala.org, 2020).

**One Law Office Manager:** Pam Beesly. Perform support work for attorneys, paralegals, legal secretaries, and legal assistants. Their duties include billing, collections, recruiting attorneys, client marketing, management of staff and firm and oversee most day-to-day operations of the office or firm. (Lawyerist.com, 2020).

**Two Other Law Office Managers:** Information Technology (IT) manager: Andy Bernard. Handles all questions and issues other members of the legal team may have with computer software, Internet or any of the technological devices used by the team. They also inform staff of new updates to technology and provide training. Accounting Manager, Stanley Hudson, is responsible for overseeing all financial duties at the firm. Duties include payroll, payments received from clients, tax filing, banking, invoicing, create and maintain data spreadsheets for all financial dealings within the firm. (Lawyerist.com, 2020).

**Law Clerk:** Jim Halpert. Advise and assist lawyers and judges on their primary duties, interpret laws, regulations and rulings for certain cases, listen and record important information in the courtroom and maintain as well as update law libraries and literature. (betterteam.com, 2019).

# Two legal secretaries: Cheryl Pelcher and Sarah Thorp- Prepares legal papers and correspondence of legal nature, such as summonses, complaints, motions, and subpoenas, using typewriter, word processor, or personal computer. May review law journals and other legal publications to identify court decision pertinent to pending cases and submit articles to company officials. (McCready v. Std. Ins. Co., 417 F. Supp. 2d 684)

**One receptionist:** Simone Zahaire- A receptionist is a person in an office who sits at the front desk of a law office, greets clients, answers phones and connects phone calls to the lawyers and other legal staff. (Receptionist. (n.d.).)

**Five other Firm personnel:**

* One secretary-Nicole Jankovich
* One paralegal- Daniel Maderia
* Two law clerks-Maelynn Jackson and Trishamae Emery
* One legal administrator-Morgan Lewis

Part 3 – File Handling Procedures

**Outline and illustrate the Firm’s internal processes for the handling of a case from beginning to end.  In doing so, you must identify the personnel within the Firm who are responsible for each task at each stage of the life of a lawsuit and describe their individual responsibilities at each stage.  Make sure to address the following aspects at a minimum:**

**Initial client contact/Retention:**

The person who is responsible for the Initial client contact/Retention is the Criminal Defense Attorneys.

***Initial Client:*** The main goal for the initial client interview is to identify the client’s problem and to gather enough facts to identify a range of appropriate ways to address the problem. However, before proceeding to do the initial client interview, you should review the client’s file, prepare questions and locations for the interview. The purpose of the interview is an opportunity to develop a relationship of trust and open communication between the lawyer and client.

***Retention:*** We come to you, no fees until we win your case! Retention is the right for A not to pay money due to B under a contract until damages due by B to A under the same contract are instituted.

After an initial meeting, your criminal case will follow 4 steps such as:

1.      Pleading

2.      Discovery

3.      Trial

4.      Appeal

**File Management**

This firm handles all our files electronically. Our software is designed so that members of the legal team can search by case name. Once into a case file there are several folders with the appropriate title to what will be found in the folder. Notes, client communication, discovery, documents from client, billing, pleadings, appeals, trial and any filed motions are some of the titles you may see in a selected case. Generally, the folders are color coded and are the same in each case.

**Billing:** Billing can be determined through hours worked with a client or thorough contracts with clients. The responsibility for billing is up to the firms secretary.

**Document Filing**

The paralegal working the case is responsible for filing all documents he or she has created for the case in question. The firm uses case management software for better organization and saving time. All members of the legal team can view cases and the files within the case from anywhere the Internet is available.

**docket control :** a system used by attorneys to alert them to upcoming filing deadlines and statutes of limitations on specific legal actions, motions, and cases. Use of docket control systems is a critical tool in preventing professional liability claims from being made against attorneys. The person responsibly for this would be a paralegal.

***Time Keeping:*** The legal team will keep track of all the tasks that are going to be billed at the end of the pending case with a computer program connected to each individual client’s case; the legal team can access it when necessary. We keep track of the time it takes to complete these tasks and keep a record of notes to show exactly why the client is getting charged. If an attorney reviews discovery or files, takes phone calls with clients, any hearing attended by the attorney, and any in person meetings will be timed to later be invoiced and billed.

***Calendaring:*** Our computer system with the client’s information also includes a calendaring system that the legal team can access and gives notifications on when an event is about to occur; it includes client meetings, court hearings, etc. When a new client’s case gets opened, we calendar all the dates available and the legal team updates it is needed. The legal assistants check weekly to make sure the court dates are accurate and two weeks before a court hearing we send out a reminder letter with the court date and time included.

**law library management, etc.**

**Part 4 – Billing Practices Develop and describe the Firm’s internal billing practices. Create a standardized retainer form which each new client must sign.**

This Agreement acknowledges the employment of the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Law Office, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (hereinafter "Attorney") by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (hereinafter "Client") and the fee arrangement by which Attorney will represent Client in the following matter or proceeding: Possession of a controlled substance

Client understands that the Attorney cannot guarantee the results of any proceeding and acknowledges that no representations have been made by the Attorney about the outcome of this matter.

LEGAL FEES: Legal fees for representation of Client in this proceeding are based upon the following hourly charges:

Attorney $ \_\_\_\_\_ Paralegal or Legal Assistant $ \_\_\_\_\_

Clients will be charged at the above rates for all time spent on this matter. Hourly charges may be increased during January of each year, and the Attorney will provide Client with reasonable notice of any such increases. An upward adjustment may also be made to the normal hourly charge for special demands made upon the Attorney including difficulty, whether the work is of an emergency character, results achieved and inability to represent other clients.

COSTS AND EXPENSES: In addition to legal fees, Client is responsible for payment of costs incurred and disbursements made on Client's behalf including, but not limited to, photocopying costs, long distance telephone charges, postage, and fees and expenses for any experts hired on the Client's behalf. Client agrees to pay all the expert fees and expenses in advance. Client specifically understands that the Attorney will not advance any expert fees and expenses.

RETAINER: A retainer of $ is required prior to commencement of any legal services for Client. The retainer will be put into a trust fund and applied against future billings. Attorney will refund the unused portion, if any, of Client's retainer upon completion of all work on Client's file.

PAYMENT OF FEES: Client will be responsible for the prompt payment of all fees and costs incurred in excess of the retainer. Absent other arrangements made in writing; payment is due immediately upon receipt of the billing statement. Charges not paid by the last business day of the billing month are considered delinquent and will bear interest at the rate of eighteen percent (18%) per annum, or the maximum rate allowed by law, whichever is less. In the event the Attorney must take legal action to collect Client's account, Client expressly agrees to pay all collection costs, including reasonable Attorney fees.

SERVICES TO BE PERFORMED: Attorney will charge Client for services which will include, but are not limited to, the following: (1) telephone contact with Client, Attorneys and other relevant persons; (2) case correspondence; (3) document preparation; (4) legal research; (5) office conferences; (6) court appearances; and (7) travel time to and from locations away from the Attorney's office. Services are billed to Client based on time expended. Each party to a legal proceeding has available certain alternatives which will affect the amount of time and money expended in the proceeding. Since the time spent on each matter varies, as does the nature and amount of work necessary to achieve a desired result, the Attorney makes no estimate as to the extent of the legal service or the total amount of fees and expenses which Client's case will require. Unless otherwise expressly stated in this Retainer Agreement, representation does not include an appeal of your case.

COSTS OF COPYING FILE: Attorney will provide Client with contemporaneous copies of all pleadings and correspondence when they are received or sent by Attorney.

WITHDRAWAL OF ATTORNEY: Client understands and expressly agrees that Attorney may withdraw from representation of Client at any time if Client fails to honor the fee arrangement therein set forth including, but not limited to, payment of fees and expenses on a timely basis; fails to cooperate in the preparation of the case; fails to make a full and complete disclosure of the facts and circumstances relating to the case; or otherwise takes any action which impedes the ability of Attorney to provide adequate and ethical representation.

THIS RETAINER AGREEMENT CONSTITUTES A LEGALLY BINDING CONTRACT BETWEEN ATTORNEY AND CLIENT. ATTORNEY ADVISES THE CLIENT TO READ THE RETAINER AGREEMENT CAREFULLY AND TO DISCUSS ANY QUESTIONS OR CONCERNS REGARDING THE TERMS OF THE RETAINER AGREEMENT.

I hereby acknowledge that I have read this Retainer Agreement and have discussed any questions or concerns I have regarding this Retainer Agreement and have received a copy of the same. I agree to retain the Attorney in accordance with the terms and conditions of this Retainer Agreement.

Dated: \_\_\_\_\_\_\_\_\_                                              \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_                                                                                Client

In consideration of the foregoing, I hereby agree to provide representation in the above matter.

Dated: \_\_\_\_\_\_\_\_\_                                          LAW FIRM

By\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Attorney

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