

College of Advocacy Pre-Training Assessment Legal Assistant

*Listed below are statements about the knowledge and skills essential to your advocacy and leadership roles. Circle a number from 1-4 that most closely describes how you perceive your ability and need in each area. We encourage you to use the assessment to get feedback from your supervisor or experienced advocate or legal assistant who is familiar with your work. **Please bring this assessment with you to the training.***

Rating Scale:

1. UNCOMFORTABLE with my current ability/understanding (need to test my level of understanding and to receive feedback)
2. SOMEWHAT COMFORTABLE with my current ability/ and understanding (need to test my level of understanding and to receive feedback)
3. COMFORTABLE with my current ability/understanding (need some practice)
4. VERY COMFORTABLE with my current ability/understanding (no additional information or practice needed)

1. Cultural Competence

- A. 1 2 3 4 Awareness of your own cultural values.
- B. 1 2 3 4 Awareness that people of different cultures have different ways of communicating, behaving, and problem solving.
- C. 1 2 3 4 Ability to address cultural barriers that affect communication between advocates and clients.
- D. 1 2 3 4 Ability to represent your client's cultural perspective in a variety of forums.
- E. 1 2 3 4 Ability to provide services that are meaningful and fit with the cultural beliefs and client lifestyles.

F. 1 2 3 4 Ability to balance between an individual's autonomy or freedom to practice personal beliefs vs. the right of a community to be protected from harm.

2. Communication/Interviewing

- A. 1 2 3 4 Able to manage time effectively in interviews or other interactions with the client.
- B. 1 2 3 4 Able to gather all the relevant information from the client, *i.e.*, operative facts, client opinions and objectives, documents, releases.
- C. 1 2 3 4 Able to express adequately to clients all necessary factual information, opinions and feelings.
- D. 1 2 3 4 Able to develop and maintain a climate of trust in client interactions.
- E. 1 2 3 4 Able to involve the client actively in decisions.
- F. 1 2 3 4 Able to attend the client using eye contact, intentional silence, attentive body posture, verbal invitations to talk and relevant note-taking.
- G. 1 2 3 4 Able to focus the interview and question the client through tactful interrupting, responding to relevant information, withholding responses to irrelevant information, and asking open and closed ended questions.
- H. 1 2 3 4 Able to use strategies for dealing with communication-blocking events and "difficult" behaviors.
- I. 1 2 3 4 Aware that establishing a climate of trust is essential in any interaction with a client.
- J. 1 2 3 4 Aware that these interviewing skills are critical skills in giving high quality services.

3. Legal Citations

A. 1 2 3 4 Able to conform all federal and state statutes, regulations and court opinions to *A Uniform System of Citation*.

B. 1 2 3 4 Able to supply the correct citation if any citations are missing or incorrect.

C. 1 2 3 4 Able to check all direct quotations word for word against the text.

D. 1 2 3 4 Able to prepare a table of contents and table of authorities.

E. 1 2 3 4 Able to describe the resources that contain court opinions, statutes and regulations.

F. 1 2 3 4 Able to describe two resources that describe and explain the law.

G. 1 2 3 4 Able to describe two strategies to find the law in the law library.

4. Formatting & Preparing Court Papers

A. 1 2 3 4 Able to format court papers according applicable court rules on physical form including: first page format, paper type, line spacing and numbering, margins, numbering, fastening, backing, pre-punched holes, corrections, exhibits and copies.

B. 1 2 3 4 Able to accomplish service of court papers by mail, personal and substituted service and by fax.

C. 1 2 3 4 Able to prepare verification forms for complaints and answers.

D. 1 2 3 4 Able to draft notices of motion, proposed orders, notice of rulings, and table of contents and authorities for a motion.

E. 1 2 3 4 Able to assemble the components of a motion (notice, points and authorities, declarations, exhibits, proof of service etc.) for filing as dictated by the appropriate court rules.

F. 1 2 3 4 Able to arrange for filing of court papers including pleadings, motions, opposition to motions, stipulations, notices of ruling and signed orders.

G. 1 2 3 4 Able to prepare a Fee Waiver Petition and Order.

H. 1 2 3 4 Able to compute the first and last day for service or filing of court papers and calendar them appropriately.

I. 1 2 3 4 Able to arrange with the court clerk, if appropriate, for availability of motion hearing dates and for any local rules or customs relating to a particular motion.

5. Assisting In Conducting Discovery

A. 1 2 3 4 Able to arrange for a deposition by coordinating dates with participants including the court reporter, opposing party, non-party deponent, or custodian of records.

B. 1 2 3 4 Able to notice a deposition of a party, non-party witness or to produce records for copying.

C. 1 2 3 4 Able to arrange for payment of deponents and court reporter.

D. 1 2 3 4 Able to format interrogatories and responses to interrogatories according to applicable court rules.

F. 1 2 3 4 Able to serve interrogatories and responses to interrogatories according to applicable court rules and statutes.

E. 1 2 3 4 Able to apply the definition of the elements to the facts to support the opposing party's position.

F. 1 2 3 4 Able to identify additional facts needed to complete the analysis.

G. 1 2 3 4 Able to determine how a third party decision-maker would rule on the issue.

6. Legal Research

A. 1 2 3 4 Able to describe the forms of American law and their relationship to one another.

B. 1 2 3 4 Able to describe how law is created.

C. 1 2 3 4 Able to describe the law's operation as authority.

D. 1 2 3 4 Able to describe the federal and state court structure.

E. 1 2 3 4 Able to describe the resources that contain court opinions, statutes and regulations.

F. 1 2 3 4 Able to describe two resources that describe and explain the law.

G. 1 2 3 4 Able to describe two strategies to find the law in the law library.

7. Planning and Conducting Negotiations

A. 1 2 3 4 Able to prepare and plan for a negotiation in a way that maximizes the client's objectives.

B. 1 2 3 4 Able to design a strategy that will support and implement the negotiation goals.

C. 1 2 3 4 Able to use a negotiation style that maximizes the possibility of accomplishing your client's goals.

D. 1 2 3 4 Able to negotiate a settlement that meets or exceeds the client's needs and instructions.

E. 1 2 3 4 Able to assess the strengths and weaknesses of a case and the chances for prevailing in an adjudication.

F. 1 2 3 4 Able to identify information needed before assessing settlement possibilities.

G. 1 2 3 4 Able to distinguish between positional bargaining and principled bargaining.

H. 1 2 3 4 Able to use and apply the vocabulary of positional bargaining in individual cases, *i.e.*, identifying: whether a bargaining range exists; both side's target and resistance points, leverage points, concession patterns, commitment points and justifications for each.

I. 1 2 3 4 Able to separate the "people" problems (communication, emotion and perception issues) from the negotiation's substance and deal directly with both issues.

J. 1 2 3 4 Able to focus on the interests of the parties and identify the concerns that lie behind stated positions.

K. 1 2 3 4 Able to identify options for mutual gain among the parties.

L. 1 2 3 4 Able to use objective criteria by which proposed solutions can be measured.

M.1 2 3 4 Able to build and maintain an effective, working relationship with the Other Side (O).

N. 1 2 3 4 Able to identify and strengthen your client's best alternative to a negotiated agreement (BATNA).

O. 1 2 3 4 Able to discover useful information from O, including O's needs and BATNA.

P. 1 2 3 4 Able to deal with O's dirty tricks during a negotiation.

Q. 1 2 3 4 Aware of the importance of thorough preparation for negotiations.

R. 1 2 3 4 Able to identify dispute resolution methods other than litigation and their appropriateness in accomplishing client goals and meeting the needs of poor, disabled, and other underrepresented communities.

8. Managing Your Practice

A. 1 2 3 4 Able to allocate time, effort and other resources necessary to carry out tasks.

B. 1 2 3 4 Able to coordinate tasks and efforts with others including lawyers, paralegals, legal secretaries and assistants.

C. 1 2 3 4 Able to work according to your organization's systems, rules and procedures governing handling of cases and files.

D. 1 2 3 4 Able to improve the system, rules and procedures governing handling cases and files to suit your needs.

E. 1 2 3 4 Able to maintain a productivity level that conforms to a standard of high quality services.

F. 1 2 3 4 Able to judge when further commitments cannot realistically be discharged competently.

Leadership

1. Organizational & Group Culture

A. 1 2 3 4 Able to identify the central cultural values that will promote your organization's effectiveness.

2. Communication

A. 1 2 3 4 Able to express information, ideas, suggestions and feelings to others in a way that maximizes the possibility that your message will be received.

B. 1 2 3 4 Able to give feedback on how you perceive (see, hear and interpret) others' behavior, accurately mirroring how you perceive the behavior leaving them to made changes and corrections.

C. 1 2 3 4 Able to listen actively — to receive another's message so that you can restate the message to the speaker's satisfaction.

D. 1 2 3 4 Able to identify the barriers, filters and socialization patterns that affect the communication process.

3. Leading

A. 1 2 3 4 Able to build and nurture your own strengths.

B. 1 2 3 4 Able to model the way — lead by doing and building commitment to action through small wins.

C. 1 2 3 4 Able to enable others to act – getting people to work together and strengthening others by sharing power and information.

4. Teams & Groups

A. 1 2 3 4 Able to identify the characteristics of effective and high performing groups.

B. 1 2 3 4 Aware that the people's ability to work together as a team is a critical component of organizational productivity in the 21st century.

C. 1 2 3 4 Able to identify strategies to improve your team's or workgroup's ability to achieve mutually established objectives.

5. Diversity

A. 1 2 3 4 Able to identify the dimensions of diversity — age, race, ethnicity, gender, physical abilities and sexual orientation, and their impact on individual perceptions and communication styles.

B. 1 2 3 4 Able to identify ways to discover and appreciate the core beliefs, values and behaviors of all groups represented in the organization including your own.

6. Self Management

A. 1 2 3 4 Able to identify a personal vision, a set of goals and a pathway to meet them.

B. 1 2 3 4 Able to use your time and energy in your priority areas.

C. 1 2 3 4 Able to experiment with several strategies to solve problems and avoid persisting in failed strategies.

D. 1 2 3 4 Able to describe how to reduce, prevent, and cope with your stress.

E. 1 2 3 4 Able to create individual development plans (IDPs) that (1) identify the knowledge or skills that you need to improve performance; (2) analyze the specific steps and resources required to acquire these skills; and (3) design an overall method for achieving improvement.

7. Conflict Resolution

A. 1 2 3 4 Able to separate the "people" problems (communication, emotion and perception issues) from the conflict situation itself and deal directly with both issues.

B. 1 2 3 4 Able to focus on interests of everyone involved in the conflict and identify the concerns that lie behind stated positions.

C. 1 2 3 4 Able to identify options for mutual gain of all the parties.

D. 1 2 3 4 Able to use objective criteria by which proposed solutions could be measured.

E. 1 2 3 4 Able to build and maintain an effective, working relationship with all persons involved in the conflict situation.

F. 1 2 3 4 Able to identify and strengthen your best alternative to a negotiated agreement (BATNA).

G. 1 2 3 4 Able to discover useful information from all sides of the conflict including needs and BATNAs.

H. 1 2 3 4 Able to resolve a conflict situation that meets or exceeds everyone's needs.