

PROJECT DESCRIPTION FORM

Chapter: University of Saskatchewan

Program year: 2024-2025

Project Name: Wills Project

SECTION A – ORGANIZATIONAL INFORMATION

- 1. Name of Organization:** Miller Thomson LLP
- 2. Mailing Address of Organization:** 123 – 2nd Avenue South, Suite 1100, Saskatoon, SK S7K 7E6
- 3. Website of Organization:** <https://www.millerthomson.com/en/our-offices/saskatoon>
- 4. Type of Organization:**
 - Charity
 - Not-for-profit
 - Association
 - Government
 - University
 - Law firm
- 5. Brief overview of the organization's mandate (2 to 4 lines maximum):**

Miller Thomson LLP is a well-respected national law firm with 12 offices across Canada. They provide comprehensive legal services to a wide range of clients including individuals, large corporations, non-profit organizations and government agencies. Miller Thomson also has a long-standing tradition of community service, and pro bono legal services are a key part of that tradition.
- 6. Organization Contact Person** *For the main portion of the project*

Name: Erica Bodie
Title: Lawyer
Telephone Number: (306) 347-8351
Email Address: ebodie@millerthomson.com
- 7. Preferred mode of contact:** Phone Email

8. Lawyer supervisor(s)

Note: For certain projects, students work with a roster of lawyers. In such instances, please include the information of all lawyer supervisors, and indicate who the lead lawyer/key point of contact is.

Type of Lawyer Supervisor:

*Note: Please check only **ONE** of the following.*

- Lawyer Supervisor - Insured
 Lawyer Supervisor – Expert (*must attach Lawyer Supervisor – Expert Checklist*)

Name: Erica Bodie

Title: Lawyer

Telephone Number: (306) 347-8351

Email Address: ebodie@millerthomson.com

The lawyer supervisor is:

- An employee of your organization
 A board member
 Other

9. **How often will the lawyer supervisor be available to meet with the student(s)?** The Lawyer Supervisor will meet with the students as required. The Lawyer Supervisor will conduct an orientation with students at the beginning of the year and will attend all Wills Clinics.

10. **Can student volunteers on this project complete their work virtually and from home?** Yes
No

SECTION B – PROJECT INFORMATION

11. Please describe the project tasks:

Description of Project

Student volunteers will have the opportunity, under the supervision of the Lawyer Supervisor from Miller Thomson LLP, to engage in the following:

Term 1

Update Legal Brochure and PowerPoint Presentation

- Students will update the legal brochure and PowerPoint presentation in plain language in accordance with any amendments to the laws respecting last Wills and testaments, health care directives, and power of attorneys in Saskatchewan.

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- The promotional material will be distributed within the community-based organizations, such as Saskatoon Housing Authority (SHA), settlement agencies, and senior residences, to help publicize the Wills Clinic sessions in January, February, and March.
 - SHA provides residential complexes all around Saskatoon designed for low income families and seniors.
 - Targeting settlement agencies and senior residence complexes in close proximity to the Frances Morrison Central Library will be ideal.
- This phase of the project is expected to be completed by the end of October.

Promote Wills Clinics

- In October, the Project Lead will reach out to community-based organizations that may be interested in promoting the Wills Clinics to their clients.
- In November, the Project Lead may have to pitch the Wills Clinics to the organizations – either as a virtually or in-person presentation – and disseminate the Legal Brochure/promotional material.

Term 2

Partake in the Wills Clinics

- Students will host 3 clinics – one in January, February, and March. All three sessions are expected to be held in person but may take place virtually.
- Location will be determined in the fall term by the Project Lead.
 - Frances Morrison Central Library (311 23 St East) is located in downtown Saskatoon, which is in close proximity to senior housing complexes, settlement agencies helping immigrant population, and low-income residential complexes.
 - Station 20 West (1120 – 20th Street West) is a community centre located in Saskatoon’s core neighbourhood. They may be interested in hosting the Wills Clinic again and are located in close proximity to low income communities.
- *January and February sessions (2 to 2 ½ hours long)*
 - Each clinic will comprise of 2 parts:
 - (1) 45-minute presentation on Wills, health care directives, and power of attorneys; and
 - (2) initial client in-take.
 - For the client in-take, students will work with a precedent questionnaire, taking detailed notes and recording any questions that need to be discussed with the Lawyer Supervisor.
 - Students will explain the drafting process and ensure that clients understand that they are expected to attend the clinic session in March to sign the completed documents.
 - After these sessions, students will work with the Lawyer Supervisor to draft the documents based on client instructions.

- *March session (3 hours)* ○ This session will provide an opportunity for the students and Lawyer Supervisor to meet with clients, sign the necessary documentation, and answer any final questions.
 - Testamentary capacity will be confirmed.
 - Signed documents will be stored at Miller Thomson LLP.

Role of Student Volunteers

- Collaborate with the Project Lead to create a work plan.
- Research the current laws as they relate to Last Wills and Testaments, Health Care Directives, and Power of Attorneys to create the legal brochure, update the PowerPoint Presentation, and social media posts.
- Attend meeting/training at the end of October or beginning of November hosted by the Lawyer Supervisor to gain knowledge on drafting wills and discuss general concerns that may arise.
- Stay in close communication with the Project Lead, teammates, Lawyer Supervisor, and PBSC Coordinators.
- Each Student volunteer will write 2-4 wills, depending on the number of clients
- Students may not provide specific legal advice and should maintain client confidentiality at all times.

Role of Project Lead

- Take lead on creating a work plan and sending it to the Lawyer Supervisor and PBSC Coordinators.
- Meet with Lawyer Supervisor to organize for the students to update the Legal Brochure, check the presentation and social media posts.
- Organize student volunteers to reach out to community-based organizations to promote the Wills Clinic's dates, times, and location.
- Schedule clinic sessions at various locations.
- Maintain regular communication with student volunteers, Lawyer Supervisor, community partners and PBSC Coordinators.
- Build and maintain a contact list that will be used by future Project Leads.

Role of Supervising Lawyers

- Provide information for students to build a work plan.
- Ensure the students are trained in drafting wills.
- Ensure the students are including the most relevant and up-to-date laws surrounding Last Wills and Testaments, Health Care Directives, and Power of Attorney in the Legal Brochure.
- Ensure the students are drafting the documents based on client instructions.
- Ensure the documents are signed and all protocol is observed.
- Revise and approve all content drafted/created by the students.
- Be present during the Will Clinics held at their location, at the library or virtually.

Which types of law are used in this project?

Wills and estates, health law

12. What is the main project deliverable?

Select **ONE** option.

- A. Creating produced content (e.g. research memos, brochures, podcasts, etc.)
- B. Completing client intake and assistance (e.g. completing client intake, providing client referrals, helping clients with their ID documents, etc.)
- C. Presenting public legal education (e.g. in-person or virtual presentations, workshops, training sessions, etc.)

13. If you checked boxes A or C in question 12, above, do you consent to the Student Volunteer(s) sending to PBSC a copy of the project deliverable? Please note it is your responsibility to collect and retain any project deliverable or documentation required to carry out the work set out in this Form. If you consent to PBSC saving a copy of the project deliverable (this strictly applies to Research and Public Legal Education projects), the documents will be securely saved and used solely for the purposes of monitoring the progression of the project, informing project development, and offering efficient continuity to returning projects, and will not be reproduced, shared, or used outside of these stated purposes.

- A. I consent to PBSC saving a duplicate of the project deliverable.
- B. I do not consent to PBSC saving a duplicate of the project deliverable.

14. If you checked boxes B or C in question 12, above, what is your plan for distribution of PBSC's Client Impact Survey?

Note: PBSC's Client Impact Survey is an important tool that allows our organization to measure client satisfaction and impact, report to stakeholders, and improve our programming. The Client Impact Survey is available through Qualtrics, which meets all federal and provincial privacy and security laws (data is stored in Canada).

For client intake and assistance projects, the student volunteers will set aside time to share the Client Impact Survey hyperlink and QR Code at the end of client meetings. Volunteers will be provided with the hyperlink and QR Code at the start of their placements. Where appropriate, printed copies of the survey may be used as long as there is a protocol in place to safeguard client confidentiality.

For public legal education presentations, the student volunteers will set aside time to share the Client Impact Survey hyperlink and QR Code with the participants at the end of the session. The hyperlink and QR Code will be embedded in the last slide of the presentation where

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possible. Volunteers will be provided with the hyperlink and QR Code at the start of their placements. Where appropriate, printed copies of the survey may be used as long as there is a protocol in place to safeguard participant confidentiality

Other. If neither of the above options are an appropriate means of distributing PBSC's Client Impact Survey for this project, please explain your plan for distribution.

15. A work plan is required for this project: Yes No

If yes, the student(s) must reach out to the lawyer supervisor, draft a work plan, and submit it by email to the Program Coordinator and the lawyer supervisor by November 1st at the latest. Please note that workplans are required for all legal research and writing projects.

The workplan will outline the asks assigned to each student volunteer during the fall and the winter terms.

16. Is this a joint project with students from any other PBSC chapters? Yes No

17. What type of training will the organization provide to the student(s)?

Note: All first year PBSC volunteers and all volunteers working on research projects must also attend a PBSC/Thomson Reuters legal research strategies workshop.

Students will attend PBSC training. Additional training on drafting Last Wills and Testaments, and Health Care Directives, and Power of Attorneys documents will be provided by Miller Thomson. Precedent documents will also be provided.

18. How many students would you like assigned to this project?

3-5 students, 1 Project Lead

19. How many hours per week will the student volunteer(s) be expected to work?

Note: PBSC students are expected to volunteer 3-5 hours per week. Additional hours are at the students' discretion, but at no time should the student be volunteering more than 10 hours per week.

Students are expected to volunteer 3-5 hours per week.

20. Will the student(s) be expected to show up for regular shifts each week, or is the schedule flexible?

The work will be flexible apart from attending the scheduled clinic hours in January, February, and March.

21. Is workspace provided for the student volunteer(s) at your organization? Yes No Project

work will be completed in person or remotely based on public health directives and guidance provided by the law firm.

22. Please list the devices and technologies the students will require to have at home in order to complete their volunteer work remotely (ex. Computer, Internet access, telephone, FaceTime, Zoom, etc.)

Students will need access to Zoom, a computer, and internet.

SECTION C – STUDENT REQUIREMENTS

23. Is there an expectation for the student(s) to be bilingual? Yes No

24. Can first year law students volunteer for this project? Yes No However, 1L students must be matched with upper year law students.

25. Please list any law school prerequisites required for this project. (e.g., administrative law, family law, immigration and refugee law.)

Strong preference will be given to students enrolled in or have completed in Wills and Estate Planning.

26. Please list any other requirements or expectations for this project. (e.g., professional or academic background, experience, etc.)

Strong preference will be given to upper year students.

SECTION D – TO BE COMPLETED BY THE PROGRAM COORDINATOR

27. Which project model(s) most accurately describes this project? If the project has multiple activities, please choose a **maximum of 3** project models. In order to obtain the most accurate data, please only select the project models that describe the majority of the project's activities. If the relevant project model is not indicated below, please contact your Program Officer.

- Public Legal Education (presentations, workshops, podcasts, brochures, blogs, etc.)
- Research (memoranda used for internal purposes only)
- Client services (court forms, shadowing, mock hearings, intake, legal clinic, etc.)
- Other (please specify)

28. Which communities does this project serve? Please identify the top **3** communities that this project serves. Please choose the primary (1), secondary (2) and tertiary (3) communities served by writing 1, 2, or 3 next to the community. This will help us understand gaps in our programming, resource allocation and provide us with information for funding proposals and reports. We understand that due to the intersectionality of identities, it is difficult to rank the top three communities served. Please note that by ranking, you are not prioritizing any issues, or communities. If you would like to add any comments, please use the comment box below.

- Children & Youth
- Domestic Violence Survivors
- Women
- Homeless & marginally housed
- Immigrants, refugees & newcomers
- Indigenous (First Nations, Inuit, Métis)
- LGBTQ+
- Linguistic minorities
- 1 People living in poverty
- 2 People living with disabilities & chronic illnesses
- People living with HIV
- People living with mental health challenges
- Precariously employed individuals
- Prisoners & former prisoners
- Racialized communities
- Religious minority communities
- Self-represented litigants
- 3 Seniors
- Trans and gender diverse individuals
- Two-Spirit individuals
- Veterans
- Other: General Project – no specific community being served

Project reviewed by On-site Supervisor

Heather Heavin

Signature

July 17, 2024

Date

Note: A final/complete copy of this Project Description Form must be provided to:

- The Organization Contact Person
- The Lawyer Supervisor(s)
- The Student Volunteer(s)
- Your Program Officer at National Office