

## Mid-Term Report

**Student Name:** \_\_\_\_\_

**Principal Name:** \_\_\_\_\_

**Firm/Organization:** \_\_\_\_\_

### Purpose

This report is designed to support meaningful, structured conversations between the Student and Principal at the halfway point of the articling term. Its primary purpose is to help both parties take stock of the Student's development to date, identify areas of strength, and recognize opportunities for growth. By pausing to reflect on the articling experience at this stage, Students are encouraged to think critically about their progress, while Principals have an opportunity to provide targeted feedback and ensure the Student is receiving a balanced and educationally valuable workload.

This report also serves as an early-intervention tool. Regular dialogue about expectations, performance, and learning needs can help prevent issues from becoming entrenched, and allows the Law Society to support Principals and Students in resolving any challenges that may arise. The process is not intended to be onerous; rather, it is meant to facilitate productive communication, promote reflective practice, and help the Student develop the professional competencies required for entry to the profession.

### Instructions

This report must be submitted to the Law Society **no earlier than the Friday of the 27<sup>th</sup> week of the Articling Term and no later than the Friday of the 28<sup>th</sup> week**. When completing this report, the Principal and Student should refer to the Competency Framework for Entry to Practice, which elaborates on each competency domain and sets out the individual skills that underpin competent practice. As noted in the Competency Framework, it is expected that competencies will be developed through a combination of the Student's legal education, experiential learning during their articles, and participation in the Law Society's Bar Admission Course. Accordingly, reporting should reflect the Student's experience across this full range of learning and training, and not be limited solely to experience gained during the articling placement.

For each competency domain listed below, rank the amount of experience received by the Student using the following scale:

**1 (None):** No meaningful exposure or experience to date in this competency domain.

**2 (Minimal):** Limited exposure or experience. The Student has a basic awareness of the competency but has had few opportunities to apply it in practice. Additional experience and instruction are required.

**3 (Adequate):** Sufficient exposure and experience to meet the baseline expectation for entry-level competence. The Student demonstrates an ability to apply the competency appropriately in practice, with guidance as needed.

**4 (Substantial):** Significant and repeated experience in this competency domain. The Student applies the competency confidently and consistently across a range of situations, with minimal supervision.

**5 (Extensive):** Broad and in-depth experience demonstrating a high level of proficiency. The Student applies the competency independently in complex or varied situations and may assist or mentor others.

### Feedback on Competencies

#### **Competency Domain 1: Ethics and Professional Responsibility**

This competency domain addresses the Student's ability to understand and uphold the ethical and professional obligations required of a practising lawyer. It includes awareness of the Code of Professional Conduct, sound judgment when navigating ethical issues, professionalism in all interactions, and a commitment to ongoing learning and development. Students should demonstrate reliability, integrity, and accountability as they manage client relationships, handle confidential information, and participate in the broader administration of justice.

Ranking: \_\_\_\_\_

Describe the Student's experience to date supporting this ranking:

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If ranking is 1 or 2, describe how additional experience will be obtained in the second half of articling:

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**Competency Domain 2: Communication**

This competency domain addresses the Student’s ability to communicate clearly, effectively, and professionally in all aspects of legal practice. It encompasses oral and written communication, the use of plain language, and the capacity to tailor messages to different audiences and contexts. It includes the ability to listen attentively, ask appropriate questions, convey legal concepts in understandable terms, and manage communications in both in-person and virtual environments. Effective communication also requires timely responses, professional tone, and the ability to handle sensitive or difficult information with empathy and clarity.

Ranking: \_\_\_\_









If ranking is 1 or 2, describe how additional experience will be obtained in the second half of articling:

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**Competency Domain 6: Advice And Advocacy**

This competency domain addresses the Student’s ability to understand client goals, provide accurate and practical legal advice, and advocate effectively for client interests. It includes identifying client needs, setting realistic expectations, and tailoring advice to the client’s circumstances. Students are expected to apply their legal analysis to develop strategies, communicate options and risks, and ensure clients understand the recommendations provided. Advocacy skills include presenting persuasive arguments, selecting appropriate advocacy techniques, and advancing a client’s position ethically and effectively in negotiations, hearings, or other legal processes.

Ranking: \_\_\_\_\_

Describe the Student’s experience to date supporting this ranking:

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If ranking is 1 or 2, describe how additional experience will be obtained in the second half of articling:

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### **Competency Domain 7: Litigation And Transactional Skills**

This competency domain encompasses the practical skills required to advance client matters through both litigation and transactional processes. It includes the ability to negotiate, draft legal documents, prepare witnesses, manage disclosure obligations, and conduct hearings or appearances before courts, tribunals, and alternative dispute resolution forums. Students should also be able to carry out core transactional tasks, such as structuring corporate entities, reviewing and negotiating agreements, and completing transactions efficiently. Competence in this domain requires attention to detail, procedural knowledge, and the ability to apply legal principles in real-world contexts to advance and protect client interests.

Ranking: \_\_\_\_\_

Describe the Student's experience to date supporting this ranking:

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If ranking is 1 or 2, describe how additional experience will be obtained in the second half of articling:

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**Competency Domain 8: Practice Management**

This competency domain focuses on the Student’s ability to manage the practical, administrative, and organizational aspects of legal practice. It includes effective workload and file management, the use of systems to track deadlines and maintain orderly, accurate client files, and an understanding of trust conditions, undertakings, and delegation. Students should demonstrate the ability to use legal technology responsibly, safeguard client information, and apply sound cybersecurity practices. This domain also encompasses foundational financial and business management competencies, including an understanding of billing practices and trust accounting obligations.

Ranking: \_\_\_\_







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**Routine Tasks**

As noted in the Education Plan, routine tasks (e.g., filing, photocopying, deliveries, reception, data entry) should not comprise more than 10 percent of the Student’s workload.

Please select one:

- The Student’s routine tasks did not exceed 10 percent of their workload.
- The Student’s routine tasks exceeded 10 percent of their workload (by selecting this option, the Principal acknowledges that steps will be taken to ensure the overall time spent on routine tasks over the articling term does not exceed 10 percent).

If routine tasks exceeded 10 percent, please provide a general explanation and brief description of the nature of the tasks:

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**Supervision And Mentorship**

How often did the Principal and the Student meet to discuss the Student’s progress and what was the primary method of providing feedback (e.g. in person, email, videoconference, phone, etc.)?

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How often did the Student and their mentor meet to discuss the Student's progress and what was the primary method of providing feedback (e.g. in person, email, videoconference, phone, etc.)? If the Student did not have a mentor, write "N/A" below.

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**External Rotations**

If external rotations took place, provide the firm(s) / organization(s), dates of external rotation(s), primary supervising lawyer(s), and competencies covered during rotation(s):

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**Periods of Leave**

Pursuant to Rule 6.08(2), Students are permitted to take up to 20 days of leave at the discretion of their Principal, and any other such leave(s) of absence as may be granted by the Education Committee.

Has the Student taken, or do they intend to take, any period of leave that requires approval of the Education Committee under Rule 6.08(2)(b)?

- No
- Yes (provide details below)

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Are there any concerns that the Student may not be able to complete the required 52-week Articling Term at least 10 days prior to the scheduled Call to the Bar ceremony, as required by Rule 6.14(2)?

- No
- Yes (describe the anticipated issue and any steps being taken)

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### Reflective Practice Assignment

The Student and the Principal have reviewed the Reflective Practice Assignment together prior to the submission of this report.

- Yes
- No

### Certification and Mutual Confirmation

We certify that the information contained in this Mid-Term Report is accurate to the best of our knowledge. We also confirm that we have met to review and discuss the contents of this report, including the Student's progress, identified strengths, areas for development, and plans for the remainder of the articling term.

**Principal**

**Student**

\_\_\_\_\_  
Signature

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Signature

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Date

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Date