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ABSTRACT

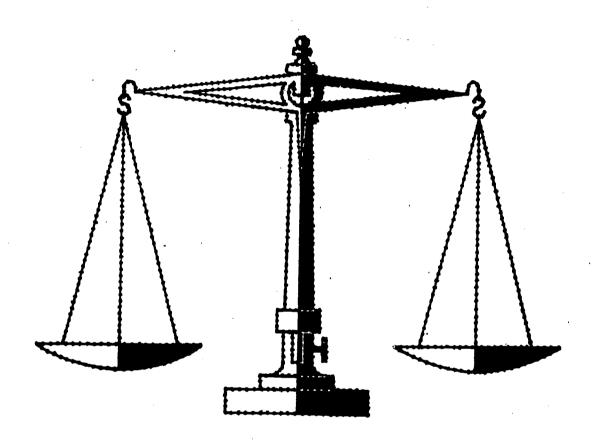
Following a review of the history of the legal assistant profession and the present status of legal assistant education, this document reports a study of the need for a legal assistant program at Kellogg Community College (KCC). A survey questionnaire was distributed to 106 private attorneys, financial institutions, businesses and industries, insurance companies, and judges and prosecuting attorneys within the KCC service area. Forty-eight responses were received (45.3 percent). Twenty respondents indicated that they currently employ at least one legal assistant, and a total of 40 legal assistants are currently employed by all respondents. Only six of these 40 have had formal training. Thirty of the respondents indicated that they would consider employing a trained legal assistant. It was estimated that 33 legal assistant positions would become available within the next five years. Based on the results of the survey, and evaluations of resource, facility, budget, and curriculum requirements, it was recommended that the proposed legal assistant program be implemented. The survey results are appended, along with a proposed curriculum outline and course descriptions. (NHM)



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LEGAL ASSISTANT



A Study

KELLOGG COMMUNITY COLLEGE

BATTLE CREEK, MICHIGAN

THE LEGAL ASSISTANT

A study prepared for the approval of the Board of Trustees, Kellogg Community College

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and

for the review of

the Michigan Department of Education, Vocational-Technical Education Service

December, 1975



THE LEGAL ASSISTANT

A study prepared under the direction of the Legal Assistant Advisory Committee, Kellogg Community Collega

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TABLE OF CONTENTS

CHAPTER		PAGE
I.	INTRODUCTION	1
и.	THE LEGAL ASSISTANT Definition Historical Information Education of the Legal Assistant	3 3 3 7
III.	THE NEED FOR LEGAL ASSISTANTS The State and National Perspective The Local Perspective	9 9 10
IV.	EVALUATION OF FEASIBILITY Placement Opportunities for Graduates Clients to be Served Curriculum and Courses Resource Requirements Budgetary Considerations	13 13 13 14 15
v.	RECOMMENDATIONS Specific Recommendations	18 18
APPENDICES		
APPENDIX		PAGE
Α.	LEGAL ASSISTANT ADVISORY COMMITTEE MEMBERSHIP	20
В.	PROGRAM ENDORSEMENTS BY THE CALHOUN COUNTY BAR ASSOCIATION AND THE CALHOUN LEGAL SECRETARIES ASSOCIATION	21
C.	REPORT OF THE RESULTS OF A STUDY TO DETERMINE THE NEED FOR AN ASSOCIATE DEGREE LEGAL ASSISTANT PROGRAM AT KELLOGG COMMUNITY COLLEGE	23
D.	PROPOSED LEGAL ASSISTANT CURRICULUM	39
Ε.	THE LEGAL LIBRARY	45



CHAPTER I

Introduction

During the fall and winter months of 1974, the College Director of
Occupational Programming held several informal meetings with representatives
of the legal profession and college student personnel staff members. The
purpose of these meetings was to explore the interest, the need, and the
potential for the possible development of a Legal Assistant Associate Degree
Program. It was concluded from these meetings that the college should
appoint an advisory committee. The task of the committee would be to
conduct a formal study of need and based upon the study results, determine
whether or not curriculum development should procede.

In January, 1975, advisory committee members were identified. The advisory committee membership (Appendix A) was selected so that the following organizations would be represented: (1) Calhoun County Legal Secretaries Association; (2) Calhoun County Bar Association; (3) the judiciary branch of government; (4) the Legal Aid Society of Calhoun County; (5) the banking business; (6) the insurance business; and (7) industrial corporations.

In February, 1975, the advisory committee was appointed. The first meeting was held during the month of March. A study of the need for a Legal Assisting Program at Kellogg Community College was conducted during the spring and summer of 1975. As a result of the study, it was concluded that an Associate Degree Curriculum could be justified in terms of need. An endorsement of the advisory committee endeavors in the legal assistant curriculum



development was given by the Executive Committee of Calhoun County Bar Association and the Calhoun County Legal Secretaries Association. The correspondence indicating endorsement is provided in Appendix B.

Chapter II of this document discusses the legal assistant from a historical perspective and also the education of a legal assistant. Chapter III discusses the need for legal assistants and details the study results conducted by the Kellogg Community College Legal Assisting Advisory Committee. The evaluation of the feasibility of implementing an Associate Degree Legal Assistant Program is contained in Chapter III. Chapter V sets forth the recommendations for a Legal Assisting Program at Kellogg Community College.



CHAPTER II

The Legal Assistant

Definition

A paralegal is a person with legal skills who works under the direction of an attorney or who is otherwise authorized by law to use these skills. 1

The term "paralegal" in the above statement is used synonymously with such terms as legal paraprofessional and legal assistant. Legal assistant is the term selected to be descriptive of the legal auxiliary discussed in this study.

It should be noted that there is a clear distinction between the legal assistant and the legal secretary. This distinction is evidenced by the fact that legal assistants (a) have separate job descriptions, (b) earn higher salaries, (c) are assigned different office space, (d) have college degrees (associate), (e) do not perform stenographic duties, (f) attend departmental meetings, (g) do research, (h) interview clients, (i) delegate to stenographers, (j) are not compensated for overtime, and (k) are entitled to bonuses.²

Historical Information

Over the years many of the professionals have created paraprofessionals to perform many of the routine duties that were formerly within the province of

²American Bar Association Special Committee on Legal Assistants. The Training and Use of Legal Assistants: A Status Report, Chicago: American Bar Association, 1974. p. 10.



¹Statsky, William P. "Paralegals: A New Career in Law." <u>Technical</u> Education Reporter, September-October, 1974, p. 66.

the professional. This is true in the medical profession, dental profession, education profession, and the accounting profession. Even ministers have their pastors of visitation and youth directors. Until recently the legal profession has overlooked the potential of utilizing paraprofessionals other than the legal secretary. In August, 1968, the American Bar Association recommended "that the legal profession recognize that freeing a lawyer from tedious and routine detail, thus conserving his time and energy for truly legal problems, will enable him to render his professional service to more people, thereby making many legal services more fully available to the public," with the further recommendation that:³

- The legal profession recognize that there are many tasks in serving a client's needs which can be performed by a trained nonlawyer assistant working under the direction and supervision of a lawyer;
- 2. The profession encourage the training and employment of such assistants; and
- 3. There be created a special committee of this Association to consider the subject of lay assistants for lawyers.

This recommendation resulted in the appointment of the Special Committee on Lay Assistants for Lawyers (renamed the Special Committee on Legal Assistants in February, 1971), which was directed to consider:

American Bar Association Special Committee on Legal Assistants,

Proposed Curriculum for Training of Law Office Personnel, Chicago: American
Bar Association, 1971. pp. 1-2.



- The kinds of tasks which may be competently performed by a nonlawyer working under the direction and supervision of a lawyer;
- The nature of the training which may be required and provided to develop confidence and proficiency in the performance of such tasks;
- 3. The role, if any, to be played by the legal profession and the bar in providing such training;
- 4. The desirability of recognizing competence and proficiency in such assistants as by academic recognition or other suitable means; and
- All appropriate methods for developing, encouraging and increasing the training and utilization of nonlawyer assistants, the better to enable lawyers to discharge their professional responsibilities.

The first year was devoted to investigation with the result that the committee felt the profession now seeks the assistance of additional legal paraprofessionals. Their recommendations concerning the training and use of paraprofessionals are based on two conclusions:

- There is a need for greater utilization of nonlawyers in the law office;
- 2. Nonlawyers are capable of functioning on several levels of proficiency and responsibility in the law office.

The committee developed a proposal as guidelines for the functions and duties, level of education, and curriculum for the legal assistant. This proposal



resulted in the "Guidelines for the Approval of Legal Assistant Education Programs" approved by the American Bar Association's House of Delegates on August 7, 1973.

According to William P. Statsky, a number of factors and forces have brought paralegalism to its present state of prominance.⁴ Among these are:

- 1. Economics Firms that employ legal assistants are more profitable than all-lawyer firms.
- 2. Efficiency A lawyer's duties include a wide range of tasks involving extensive, medium, and minimal complexity. Tasks that are of minimal and possibly medium complexity may often be delegated to legal assistants.
- 3. Restructuring of the Professions Generally Paralegalism represents this phenomenon within the legal profession that have hitherto taken place in other professions such as medicine, dentistry, education, and the clergy.
- 4. Schools The growth of community colleges in the 1960's has resulted in the availability of public education to train paralegals.
- 5. Conferences Two important national conferences: (1) July, 1970 conference on legal paraprofessionals sponsored by the Office of Economic Opportunity; and (2) June, 1971 conference on paralegals cosponsored by the American Bar Association and the Council on Law Related Studies.

⁴Statsky, William P. <u>Introduction to Paralegalism</u>, St. Paul: West, 1974. pp. 2-5.



- Organizations In 1968, the House of Delegates of the American

 Bar Association founded the Special Committee on Legal Assistants.

 In 1972, the Office of Economic Opportunity created the National

 Paralegal Institute to develop paralegal strategies in the publicly

 funded neighborhood legal service offices.
- 7. The Promise of Expanding Legal Services Attention is being given to paralegals in hope that they might assist the lawyer in making his services more widely available.

Education of the Legal Assistant

Legal assistant educational programs are offered in many different educational institutions. The vast majority are offered in junior and community colleges. In addition, these educational programs are offered in law schools, four-year colleges, adult education and university extension schools, and in proprietary schools. In Michigan, programs to prepare legal assistants are offered at Grand Valley State College, Ferris State College, and in the continuing education division at Oakland University. In addition, the following community colleges offer programs: Lansing, Macomb, and Mott.

The time duration of legal assistant programs vary. They range from one year certificate programs to four year baccalaureate programs. The majority of those in community colleges are two year associate degree programs. The American Bar Association, "Guidelines for the Approval of Legal Assistant Education Programs", state a minimum of sixty (60) semester hours of credit or ninety (90) quarter hours of credit. This implies a two year program.



In 1974, the U.S. Office of Education awarded \$400,000 to the American Association of Junior and Community Colleges to develop and implement paralegal programs at six community colleges located throughout the nation.

This is a four year project which will result in curriculum development, program implementation, and evaluation and completion of guidelines exemplifying a model curriculum for paralegal programs in the community college.

The American Association of Junior and Community Colleges indicated that there were sixty-one (61) two year colleges offering courses concerned with legal services in 1974. Most of these courses were related to legal secretarial service or business law. The association further indicated in 1974 that two year colleges have not developed paralegal programs to meet the expectations of the legal profession or the needs of the public. During the past several months, however, there has been a considerable increase in the number of legal assistant programs offered by community colleges.



CHAPTER III

The Need for Legal Assistants

The State and National Perspective

There is a growing demand by the public at large for legal services. As a result, the need for trained personnel in law offices will continue to expand in the future. Some studies indicate that fifteen to twenty-five percent of the work performed in law offices can be delegated to paraprofessionals without reducing the quality of the services rendered. The American Bar Association is advocating the utilization of legal assistants. James D. Fellers, President of the American Bar Association, stated in April, 1975, that "paralegals are an absolutely essential component of quality legal services in the future." He added that lawyers who fail to utilize legal assistants to perform nonlawyer tasks are not providing their clients with the most efficient service, and consequently, "the costs of legal services are higher than they need to be. They are also higher than we can allow them to remain."²

Because of the fact that the legal assistant profession is an emerging one, state and national data reflecting manpower needs are not available.

There are indications, however, that the field has great promise. This is indicated by the rapid increase in articles concerning the legal assistant being



¹Baker, Wade F. "The Changing System of Delivering Legal Services." Case and Comments, September-October, 1975. pp. 31-33.

²American Bar Association, "Paralegal Training Probed by Committee." American Bar News, May, 1975.

published in both professional journals and lay magazines. It appears that there will be an increasing demand nationally for trained legal assistants to work in private law firms, in trust departments of banks, in insurance companies, and in government agencies.

The Local Perspective

In order to assess the need for and the interest in a legal assistant program at Kellogg Community College, a study was conducted to gather information from members of the legal profession who were identified as being potential employers of legal assistants. The study sought not only to obtain information concerning the current level of utilization of legal assistants but also to determine the future need for legal assistants, the employment potential, and information about the tasks that would be assigned to legal assistants as perceived by those completing the questionnaire.

The survey questionnaire was distributed to private attorneys, financial institutions, business and industries, insurance companies, and judges and prosecuting attorneys within the Kellogg Community College service area. A total of one hundred six questionnaires were mailed. Forty-eight (48) responses representing forty-five and three tenths percent (45.3%) of the questionnaires were received. The following were revealed as a result of the study:

1. Twenty (20) of the forty-eight (48) respondents indicated that they currently employ a person or persons to perform the functions of a legal assistant.



- 2. A total of forty (40) persons are currently employed as legal assistants in the college service area.
- 3. Only six (6) of those functioning as legal assistants have had formal training. The others were trained "on-the-job".
- Thirty (30) of the forty-eight (48) respondents indicated that they would consider employing a trained legal assistant. Eight (8) of the respondents indicated that they would not.
- 5. The number of legal assistant positions available are:

immediately	3 positions
in one year	18 positions
in 2 years	7 positions
in 3 years	1 position
in 4 years	2 positions
in 5 years	2 positions

6. The estimated annual salary ranged from \$7,000 to \$15,000.

The Legal Assistant Advisory Committee discussed at length the interpretation of the survey results. Of major concern was the low response rate (45.3%). It was concluded that a follow-up to increase the rate of return would not be worth the additional effort required. It was also concluded that the low response rate does not necessarily indicate a lack of interest in the program or a lack of need for legal assistants. Further, the committee felt that since the job of the legal assistant is an emerging occupation, that the legal community in general is not sufficiently knowledgeable about the role of the legal assistant to adequately respond to the questionnaire in spite of the effort to identify this legal auxiliary. The committee expressed strong feelings



that a need does indeed exist and that there will in the future be an increasing demand for trained legal assistants. The literature reviewed supports this position. Finally, the endorsement of the development of a Legal Assistant Program by the Executive Committee of the Calhoun County Bar Association and the Calhoun County Legal Secretaries Association convinced the advisory committee that they should procede with curriculum development.

Appendix C contains the Report of the Results of a Study to Determine

the Need for an Associate Degree Legal Assistant Program at Kellogg Community

College. Included in the above named report is a copy of the questionnaire, and
copies of three letters received as a response to the questionnaire.



CHAPTER IV

Evaluation of Feasibility

Placement Opportunities for Graduates

According to a survey conducted in 1972 by the Special Committee on Legal Assistants of the American Bar Association, legal assistants were employed by private law firms, government, banks, corporations, and by a professional trade association. Legal departments in insurance companies as well as social services such as legal aid societies also afford placement opportunities.

The median salary paid to legal assistants as determined in the 1972 survey mentioned above was \$8,550. Large law firms (15 or more attorneys) paid legal assistants at a higher rate and employed more of them than did smaller law firms.

Although the study of need conducted in the college service area did indicate placement opportunities, the number of opportunities could be considered marginal at the present time. It must be reiterated, however, that this is an emerging occupation and as the legal community experiences and becomes more knowledgeable about the services that a trained legal assistant can provide, increasing employment opportunities will become available.

Clients to be Served

The Legal Assistant Program will serve both in-service students and pre-service students. In-service students are those who are currently employed in the legal field whereas the pre-service students are those who



have no prior experiences related to the legal field. It is the opinion of the Advisory Committee that the majority of those persons enrolling in the program during its first few years of operation will be in-service students. These are persons who are currently employed as legal secretaries and who desire to upgrade themselves to become legal assistants. Subsequently, as the program continues, it is expected that an increasing number of pre-service students will be attracted.

From the job market point of view, the anticipated clients to be served is a desirable combination. This is because the in-service students for the most part will not be seeking employment upon completion of the program but will continue with the same employer in a legal assisting capacity. Likewise, since legal assisting is an emerging occupation, the job market is expected to increase as the program serves a greater number of pre-service students.

Curriculum and Courses

A considerable amount of research was done prior to curriculum development. The American Bar Association, the Michigan Bar Association, and the American Association of Junior and Community Colleges are the professional organizations that have been contacted and that have provided information for curriculum development. In addition twenty-three community colleges scattered throughout the nation were contacted to secure curriculum information.

Two publications, <u>Guidelines for the Approval of Legal Assistant</u>

Education Programs and Proposed Curriculum for Training of Law Office



Personnel were furnished by the American Bar Association. The Michigan Bar Association has recently appointed a Committee on Legal Assistants. Contact has been made with the chairman of this committee to determine if any of their activities would impact the legal assistant curriculum. Although this committee has not resolved any of their concerns, they are addressing certification and/or licensing issues for legal assistants. Concurrent with that is accreditation of legal assistant educational programs. Mr. Joel Krisoff, committee chairman, indicated that compliance with the ABA "Guidelines" would satisfy any requirements that the Michigan Bar Association might impose.

Communications have been maintained throughout this program development process with the project Director and Assistant Director of the Paralegal Assistant Education Project sponsored by the USOE and administered by the American Association of Community and Junior Colleges. The materials developed to date in this national project have been provided.

The advisory committee received all of the curriculum materials gathered. At the same time, they developed goal statements (statements about what it is that the graduate should be able to do) to be used as a basis for curriculum development.

The curriculum recommended by the advisory committee along with course descriptions may be found in Appendix D.

Resource Requirements

The following resources are required to implement the Legal Assistant Program and to obtain the status of an approved school by the American Bar Association. These requirements comply with the <u>Guidelines for the Approval</u> of Legal Assistants Program.



1. Faculty - See Chapter V, Recommendations

The program director and instructors must possess education, knowledge, and experience in the legal assistant field.*

The program director shall be a full-time member of the faculty of the parent institution.*

*Required for ABA approval.

2. Facility

A classroom that will accommodate the lecture-discussion mode of instruction will be required.

Classroom furniture should consist of tables and chairs to permit students to work with software in the classroom.

In addition, space should be provided in the Learning Resources Center to accommodate a legal library and to permit legal research.

3. Instructional Equipment and Instructional Materials

No instructional equipment other than the furniture which is indicated in (2) above is required. Instructional materials consisting of a legal library is essential. A listing of the contents of the legal library is provided in Appendix E.



Budgetary Considerations

First year of operation:

Salaries - part time faculty at the prevailing overload rate established by the College Board of Trustees.

Fringe Benefits - Not applicable

Instructional Materials:

Legal Library

\$9,000 (est.)

Instructional Equipment - Not applicable

Facilities - Not applicable

Total

\$9,000*

Second year of operation:

Salaries - Full time program coordinator/instructor

\$16,000 (est.)

Additional part time faculty dependent upon

program demands at prevailing overload rate.

Fringe Benefits - 24% of coordinator/instructor salary

3.840

Instructional Materials - Not applicable

Instructional Equipment - Not applicable

Facilities - Not applicable

Total

\$19,840*



^{*}Does not include overload salary costs

^{*}Does not include overload salary costs

CHAPTER V

Recommendations

It is recommended that this proposed Legal Assistant Program be approved by the Kellogg Community College Board of Trustees and be implemented beginning the 1976-77 school year and that approval for this implementation be sought from the Michigan Department of Education.

Specific Recommendations

1976-77 School Year

- + That the legal assistant courses be taught only at night to serve both in-service and pre-service persons.
- + That qualified part time faculty be employed to develop the technical course content and teach the technical courses.
- + That approximately \$4,500 of capital funds be appropriated to purchase a legal library. (Vocational Education matching funds will support the other \$4,500)
- + That this program be assigned to the Business and Technical Division for administrative purposes.
- + That shelving space be made available in the Learning Resources Center to house the legal library.
- + That a brochure be developed to publicize the program.
- + That this program be incorporated into all future college publications where applicable.
- + That information be distributed to the legal community within the college service area and to all college offices concerning the implementation of this curriculum.



+ That the college student personnel staff be given curriculum detail for for student advisory purposes and so that they may assist in publicizing the program.

1977-78 School Year

- + That a full time program coordinator/instructor be employed.
- + That legal assisting courses be taught both at day and at night if sufficient demand exists
- + That preparations be made to obtain program approval by the American

 Bar Association upon completion of the second year of operation.



APPENDIX A

LEGAL ASSISTANT
ADVISORY COMMITTEE MEMBERSHIP



LEGAL ASSISTANT ADVISORY COMMITTEE

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APPENDIX B

PROGRAM ENDORSEMENTS

bу

THE CALHOUN COUNTY BAR ASSOCIATION

and

THE CALHOUN COUNTY LEGAL SECRETARIES ASSOCIATION

APPENDIX B

October 13, 1975

Kellogg Community College Board of Trustees 450 North Avenue Battle Creek, MI 49016

Dear Board Members:

The Executive Committee of the Calhoun County Bar Association is pleased that the Legal Assistant Advisory Committee under Dr. Robert D. Steely is considering the development of a legal assistant associate degree program.

The fact that the paralegal movement is rapidly gaining momentum, is reflected in the recognition by the legal profession that paralegals can assist in the more effective delivery of legal services and the resulting increase in the demand for this type of personnel.

We would endorse your endeavors in this area and would be pleased to assist in indentifying the specific competencies demanded and in designing a curricula to fulfill our present demands.

Very truly yours,

EXECUTIVE COMMITTEE OF THE CALHOUN COUNTY BAR ASSOCIATION

Bryan C. Dandenault, President

BCD: JAF:mm

- 22 -

Calhoun County Legal Secretaries Association

AFFILIATED WITH MICHIGAN ASSOCIATION OF LEGAL SECRETARIES NATIONAL ASSOCIATION OF LEGAL SECRETARIES

December 3, 1975

Dr. Robert D. Steely Director, Occupational Programming Kellogg Community College 450 North Avenue Battle Creek, Michigan 49016

Dear Dr. Steely:

Calhoun County Legal Secretaries Association is pleased that Kellogg Community College is considering the development of a Legal Assistant Associate Degree Program.

We have several members that have expressed an interest in pursuing this degree.

We wish to endorse your efforts in developing this program in the legal field, and offer the support of our organization.

We will be pleased to assist in any way that we can.

Sincerely yours,

Shirley Handy
Shirley Handy

President

SH/el



APPENDIX C

REPORT OF THE RESULTS OF A STUDY TO

DETERMINE THE NEED FOR AN ASSOCIATE

DEGREE LEGAL ASSISTANT PROGRAM AT

KELLOGG COMMUNITY COLLEGE



REPORT OF THE RESULTS OF A STUDY TO DETERMINE THE NEED FOR AN ASSOCIATE DEGREE LEGAL ASSISTANT PROGRAM AT KELLOGG COMMUNITY COLLEGE

I. INTRODUCTION

The Office of the Director of Occupation Programming in cooperation with the Legal Assistant Advisory Committee elected to conduct a study of need in order to determine the feasibility of designing and recommending an associate degree program to prepare legal assistants.

II. METHODOLOGY

A preliminary draft of a questionnaire was developed during the winter of 1975. A sub-committee selected from the membership of the Legal Assisting Advisory Committee worked with the Director of Occupational Programming to refine the instrument and to present it to the entire Advisory Committee.

After acceptance by the Committee and the preparation of a mailing list, the questionnaire along with an explanatory cover letter was prepared for mailing. The mailing list consisted of private attorneys, financial institutions, business and industries, insurance companies, judges and prosecuting attorneys all within the college's service area. One hundred six questionnaires accompanied by a cover letter explaining the purpose of the survey, an advisory committee membership listing, and a postage paid self addressed envelope were mailed on May 14, 1975. A copy of the cover letter, advisory committee membership listing, and the survey instrument are attached to this report.

Although the majority of the responses received were returned during the early part of June, the last response was received during the month of July, 1975. No effort was made to follow-up those who did not respond in order to secure a higher percentage of returns. It was felt that those who did



voluntarily respond to the questionnaire would provide sufficient information for committee decision making and that additional responses stimulated by follow-up contacts would not be sufficient to influence the survey results.

III. FINDINGS

Forty-eight, representing 45.3%, of the 106 questionnaires mailed were returned. One questionnaire was marked by the Post Office as undeliverable and was returned. This questionnaire is not included in the above count as being a return. An additional questionnaire was completed and returned without any identification of the respondent. This questionnaire was considered as a response and included in the above as a return.

TABLE I below indicates the number of mailings and the number and percentage of responses by categories.

TABLE I. MAILING AND RESPONSES BY CATEGORY

CATEGORIES OF		NUMBER	RE	TURNS
RESPONDENTS		MAILED	NUMBER	PERCENTAGE
DESCRIPTION	CODE			
Judges and Prosecuring Attorneys	A	12	6	50.0
Private Attorne	ys* B	65	29	44.6
Financial Institutions	С	20	7	28.6
Insurance Companies	Ð	6	4	66.7
Business and Industries	Е	3	2	66.7
TOTAL		106	48	45.3

*The questionnaire returned without a signature is included in this category.



Below is a summation of the responses to the questions on the survey instrument by the category of the respondants. (Not all respondants answered all questions, this accounts for discrepancies in the totals).

QUESTION #1

Does your firm cu	rrently employ a	person or persons	to perform
the functions of	a legal assist a n	as defined above	≥?

	A*	B≉	C*	D≉	E*	TOTAL
YES	4	12	2	2	0	20
NO	2	16	5	2	2	28

*See TABLE 1. for Category Code

a) How many do you employ?

	A	В	C	D	E	TOTAL
Number	8	18	8	6	0	40

b) How was this person trained?

	A	В	C	D	E	TOTAL
On the job	4	16	2	2	0	24
Formal program	1	4	1	0	0	6
Other	1	0	0	0	0	1

QUESTION #2

Tasks you would consider assigning to legal assistants

A.	Law	office administration	•	_	_		_	
	1.	Supervising work flow	A	В	С	D	E	TOTAL
	٠	a) non-attorney staff	4	21	2	1	0	28
		b) attorney staff	1	7	0	1	0	9



2. Personnel					
A	В	C	D	E	TOTAL
a) Hiring, evaluating;supervising non-attorney staff1	15	1	1	0	19
b) Develop and implement office policies and procedures 3	18	2	1	0	24
3. Bookkeeping			•		
A	В	С	D	E	TOTAL
a) Payroll 1	26	0	0	0	28
b) Paying Office Bills 1	28	0	1	0	31
c) Accounts Receivable control 0	27	0	0	0	27
d) Preparing fee and disbursement client statements 2	. 23	1	0	0	27
4. Hadntain Law Library	В	С	D	E	TOTAL
5	24	2	1	0	33
5. Supervising Purchasing of Office					
A	В	С	D	E	TOTAL
5 .	26	0	1	0	33
6. Preparation of Office Memoranda					
A	В	С	D	E	TOTAL
5	16	2	1	1	26
7. Calendar Control	В	С	D	E	TOTAL
5	19	0	1	0	25



B. Information Gathering

			A	В	C	D	E	TOTAL
	1.	Legal Research	4	15	2	1	2	24
	2.	Obtain information from clients	3	24	2	0	• 1	31
	3.	Investigations	2	16	1	0	1	20
	4.	Shepardize	2	17	1	1	2	23
	5.	Index Documents and Prepare Digests	3	15	1	1	2 ·	22
	6.	Conduct Initial Client Interview	2	12	1	0	0	15
	7.	Search and Check Public Records	4	22	1	0	2	30
	8.	Statement Taking	3	17	1	0	1	23
	9.	Credit Checks	2	22	2	0	0	26
c.	Dat	a Application/Document Preparation Assisting in the preparation of the Legal Memorandum, Briefs and	he fol A	lowing B	С	D	E	TOTAL
	_,	Pleadings	4	14	1	1	2	22
	2.	Draft Wills, Deeds and Trusts	1	16	1	0	1	19
	3.	Tax Analysis	1	8	2	0	0	11
	4.	Probate Inventories and Inheritance and Federal Estate Tax Returns	0	22	3	0	0	26
	5.	Bankruptcy Schedules	0	19	1	0	0	20
	6.	Subpoenas and Deposition Papers	2	22	1	0	0	26
	7.	Interrogatories and Answers to Interrogatories	1	17	. 1	0	1	-21
	8.	Security Devices	1	9	1	0	1	12
	9.	Settlement Agreements	2 .	10	1	0	1	14



				•				
D.	Coı	mmunications	A	В	c	D	E	TOTAL
	1.	Notfying clients of case status.	5	27	1	0	0	33
	2.	Make arrangements for depositions and hearings	· 3	28	2	0	0	33
	3.	Scheduling party - witness court testimony	5	25	1	0	0	31
Ε.	App	pearances		•				
			A	В	С	D	E	TOTAL
	1.	Before Governmental Agencies	1	3	1	0	0	5
	2.	Before Administrative Agencies	1	3	1	0	1	6
F.	Gen	eral Functions						
			A	В	С	D	E	TOTAL
	1.	Typing	6	26	2	1	0	35
	2.	Office Filing	6	27	2	1	0	36
	3.	Docketing and case scheduling	6	25	1	1	0	33
	4.	Operate Office machinery	6	27	2	1	0	36
	5.	Serve papers	2	21	1	0	0	24
	6.	File papers, motions, or pleadings	5	27	0	1	0	33
	7.	Take dictation	6	23	2	1	0	32
	8.	Receptionist	6	21	1	1	0	29
	9.	Appear for client in court	0	3	1	0	0	4

QUESTION #3

If trained legal assistants were available, would your company consider hiring them?

	A	В	С	Þ	E	TOTAL
YES	4	21	3	1	1	30
NO	Ò	5	1	1	1	8



a) When would you anticipate this position to be available?

	•	A	В	С	D	E	TOTAL
1.	Immediately	1	1	1	0	0	3
2.	Within the next year	3	12	1	1	1	18
3.	In 2 years	1.	6	0	0	0	7
4.	In 3 years	0	1	0	0	0	1
5.	In 4 years	0	2	0	0	0	2
6.	In 5 years or more	0	2	0	0	0	2

QUESTION #4

Estimation of annual salary you would offer

	A	В	С	D	E
Salary Ranges	7,500- 15,000	7,000- 13,000	8,000- 10,000		

IV. COMMENTS

Additional comments were not requested on the questionnaire. However, we did receive the following comments:

"Would not hire such a person - should have a four-year degree" ... Attorney

"Program appears too ambitious for a two-year training program. Also, I doubt that it can be combined with general education in the time available (4 years)"...Attorney

"The program is not applicable to banks"...Bank of Albion

"Legal work is performed by private law firm. It is unlikely we would employ a legal assistant"....First Federal Savings and Loan

"This organization has no Trust Department and cannot have one under the present statutes"...Hastings Savings and Loan

"Do not have sufficient work of this type"... Federal Center

"We do not have a need for an individual with the education mentioned at the regional level"...State Farm Insurance



"We utilize the legal services of a local firm of attorneys. All functions therefore are not applicable".....Twentieth Century Guardian Life Insurance Company

Attached hereto are three letter that were received in conjunction with the legal assistant study.



LAW OFFICES

ALLEN, WORTH & HATCH

IESSE M. HATCH (1858-1940)
MAXWELL B. ALLEN (1884-1942)
JOHN M. ALLEN
RAYMOND R. ALLEN
WILLIAM R. WORTH
H. VAN DEN BERG HATCH
KURT F. LETZRING
E. FRANKLIN HILL.JR.

OF COUNSEL: HAZEN I. HATCH

1009 SECURITY NAT'L BANK BLDG.
BATTLE CREEK, MICHIGAN 49014
TELEPHONE 965-0561
AREA CODE 616

302 W. GREEN STŘEET

MARSHALL, MICHIGAN 4906

TELEPHONE 781-2829

AREA CODE 616

PLEASE REPLY TO:

Battle Creek Office May 22, 1975

Kellogg Community College 450 North Avenue Battle Creek, MI 49016

Gentlemen:

We are enclosing herewith our reply to the questionnaire which you sent us with the letter of May 6, 1975. The
answers are somewhat tentative because the amount and kind of
responsibilities delegated to a legal assistant will depend on
that person's general educational background and training and
other employment experience in addition to the training furnished by your proposed program. These considerations obviously
have a very important bearing upon salary scales so we have not
attempted to answer that question. As a matter of fact, we are
not at the present time sure what salary scales freshly admitted
attorneys command in private practice in this area.

We do wish to say that we are deeply interested in your effort to develop this program and if the program itself is successful, I am sure that competent graduates of the program will be indemand in this area and elswhere.

Yours very truly,

furmand R. Will

RRA/msh Enclosure



Tenth Bistrict Court of Michigan

Culhom County, Michigan

June 2, 1975

DISTRICT COURT ROOMS

COUNTY BUILDING
MARSHALL, MICHIGAN 49068

CITY HALL
SPRINGFIELD, MICHIGAN 49015

CITY HALL BATTLE CREEK, MICHIGAN 49014

> CITY HALL ALBION, MICHIGAN 49224

Kellogg Community College 450 North Avenue Battle Creek, MI 49016

Dear Sirs:

I have grave doubts that this type of degree is appropriate for employees of the 10th District Courts. This is especially true since we have no research clerks. In particular, the Court Administrator should have a degree in that field. Furthermore, the magistrates are required to have some knowledge of criminal statutes and the law surrounding the area of arrests and searches. The office of administrator and magistrates require special knowledge and skill. The other employees of our Court are basically clerks and typists and are not para-legal in nature.

I hope this information, though negative, is of help to you.

Alfonso A. Magnotta

Tenth District Judge

AAM/nl

Barry County

PROBATE COURT

P. O. BOX 220 HASTINGS, MICHIGAN 49058

PHILIP H. MITCHELL. Judge

PHONE 945-3468 AREA 616

ALEKSANDRA VILDE. Register

May 15, 1975

Mr. Robert D. Steely, Director Occupational Programming Kellogg Community College 450 North Avenue Battle Creek, Michigan 49016

Dear Mr. Steely:

Your questionnaire concerning the use of legal assistants in law offices does not quite fit the use of legal assistants in the court structure. For this reason I thought I would write you concerning the situation in this Court.

Currently we employ a Register of Probate, two Deputy Registers of Probate, and one Court Reporter who also acts as a deputy register of probate when not engaged in the court reporting work.

All four of these people have had and are receiving special training in their duties in connection with the court work. They also frequently consult with the secretaries of the various lawyers and notify the various lawyers that reports are due in connection with matters being handled in the court.

It would be only fair to say also that frequently these four ladies advise the Judge that he should complete certain tasks, or that he should review some order entered to make certain that it complies with all of the legal requirements.

The training program for these people has been handled in part by the Judge, in a large measure by the Register of Probate, and by a court reporter who gave special training to the lady serving as our Court Stenographer.

In addition to the training given locally, we have certain training given to the clerical staff by the Court Administrator's Office which conducts two-day seminars once a year for the benefit of the Register of Probate and her chief deputy.

It is unlikely that this office will have need of additional clerical personnel during the next two years.



Whenever there is a need for additional clerical personnel, probably the persons employed will be those who have had experience working in law offices or have had experience working in other courts.

I suggest that you inquire of the Court Administrator's Office at Lansing concerning the possibility of providing courses of instruction for court personnel in the various courts. Such training might very well fit in with the training of legal assistants for lawyers.

Sincerely yours,

Philip H. Mitchell Judge of Probate

PHM: av



KELLOGG COMMUNITY COLLEGE

1-616-965-3931

450 NORTH AVENUE BATTLE CREEK, MICHIGAN 49016

May 6, 1975

Dear Sir:

Interest has been expressed to Kellogg Community College in the development of a Legal Assistant Associate Degree Program. Programs of this type are being developed in community colleges throughout the nation. This effort is encouraged by the American Bar Association, who has developed some rather broad guidelines for legal assistant programs.

The college is working with an Advisory Committee made up of your colleagues in the legal profession to study the need for this educational program. The study is being conducted in Kellogg Community College's service area. Important factors in this study are the employment opportunities for legal assistants, the salary level, and the functions which legal assistants may be assigned.

The Advisory committee has developed the enclosed questionnaire. You were selected by the committee to respond on behalf of your organization. Your response will assist the committee in establishing direction for legal assistant education at Kellogg Community College. If you are unable to timely complete the quiestionnaire, please forward it to another attorney in your organization. All individual responses will be kept confidential. The information provided will appear in summary data only.

Enclosed is a postage paid self-addressed envelope. I shall appreciate your cooperation in completing and returning the questionnaire at your earliest convenience.

Sincerely,

Director, Occupational Programming

RDS:mp

Trustee

Trustee

KELLOGG COMMUNITY COLLEGE

LEGAL ASSISTING SURVEY QUESTIONNAIRE

SUGGESTED DEFINITIO	N	ľ	1
---------------------	---	---	---

A legal assistant is a person with legal skills who works under the supervision of an attorney. This paraprofessional is able to apply knowledge of law and legal procedures in rendering direct assistance to lawyers engaged in legal research; design, develop or plan modifications of new procedures, techniques, services, processes or applications: prepare or interpret legal documents and write detailed procedures for practicing in certain fields of law; select, compile and use technical information from such references as digests, encyclopedias or practice manuals; and analyze and follow procedural problems that involve independent decisions. He or she may be employed in a private attorney's office, in corporation law, in the banking industry, in the insurance field, in the judicial branch of government, in legal aid societies, in public defender's offices, or in governmental agencies.

1.	Does you	r firm cur	rently emp	loy a perso	n or pers	ons to	perform t	he	functions
	of a lega	al assista	nt as defi	ned above?					

		YES
ΙF	YES:	
a.	How many do you employ?	
	How was this person trained?	
*	On the job	
	Formal program	
	Other	•

2. CATEGORIZATION OF POSSIBLE LEGAL ASSISTANT FUNCTIONS:

Check the tasks which you would consider assigning to legal assistants: (if the task indicated is not applicable to your office, please indicate by writing "NA" in the parenthesis following the task)

A. Law Office Administration

⊥.	Super	vising	work	ITOM	of:
----	-------	--------	------	------	-----

3)) non-attorney staff()
o)	attorney staff()

2. Personnel:

- a) Hiring, evaluating and supervising non-attorney staff ()
- b) Develop and implement office policies and procedures eq. sick leave, vacations, personal leave, etc.()



	٥.	Bookkeeping:
		a) Payroll(
		b) Paying office bills
		c) Accounts receivable control
		d) Preparing fee and disbursement
		client statements(
	4.	Maintain Law Library(
	5.	Supervising Purchasing of Office
	_	Materials and Supplies
	6.	Preparation of Office Memoranda
	7.	Calendar Control(
		Other
В.	<u>Inf</u>	Formation Gathering
	1.	Legal Research
	2.	Observed T. Co., and the Co. Co. Co.
	3.	Investigations
	4.	Shepardize
	5.	Index Documents and Prepare Digests(
	6.	Conduct Initial Client Interview
	7. 8.	Search and Check Public Records()
	9.	Statement Taking()
	J.	Credit Checks() Other
c.	Dat	a Application/Document Preparation
· ·	Ass	isting in the preparation of the following:
	1.	Legal Memorandum, Briefs and Pleadings()
	2.	Draft Wills, Deeds and Trusts()
	3.	Tax Analysis()
	4.	Probate Inventories and Inheritance and
		Federal Estate Tax Returns()
	5.	Bankruptcy Schedules()
	6.	Subpoenas and Deposition Papers() Interrogatories and Answers to Interrogatories()
	7.	Interrogatories and Answers to Interrogatories()
	8.	Security Devices()
	9.	Settlement Agreements() Other
D.	Com	munications
	1.	Notifying clients of case status()
	2.	Make arrangements for depositions and hearings()
	3.	Scheduling party - witness court testimony()
		- · · · · · · · · · · · · · · · · · · ·



	E.	<u>App</u>	<u>earances</u>	
		1. 2.		
	F.	Gen	neral Functions	
		1. 2. 3. 4. 5. 6. 7. 8. 9.	Typing	
3.			ned legal assistants were available, would your organizer employing them? YES NO	
	а.	pos tan	you would employ a legal assistant, when would you anti ition to be available? (Please indicate the number of ts that you would employ on the line following the appre period):	legal assis
		1) 2) 3) 4) 5) 6)	Immediately Within the next year In 2 years In 3 years In 4 years In 5 years or more	·
4.	tra	ined	ible, estimate the annual salary that you would current legal assistant (Associate Degree graduate of a Legal approved by the American Bar Association).	
			THANK YOU	
	NAME	E OF	RESPONDENT	
	ORGA	ANIZ#	ATION	_



APPENDIX D

PROPOSED LEGAL ASSISTANT CURRICULUM

KELLOGG COMMUNITY COLLEGE

PROPOSED LEGAL ASSISTANT CURRICULUM

FIRST YEAR

First Semester		
Course		Credit Hours
English 101 or	Basic Communications in Writing	
English 120 Accounting 101A INTRODUCTION TO LEGA GENERAL LAW I* General Studies Elective	Writing Improvement General Accounting L TECHNOLOGY*	3 4 2 3 3
		15
Second Semester		
Course		Credit Hours
Accounting 101B LEGAL WRITING AND RES	General Accounting continued SEARCH*	4 4
Political Science 200 GENERAL LAW II* Physical Education	American System of Government	3 3 2 16
	SECOND YEAR	
First Semester		
Course		Credit Hours
GOVERNMENT REGULATION Technical Elective General Studies Elective	ONS*	4 2 or 3
Sociology 202	Social Problems	6 3



Second Semester

Course	Credit <u>Hours</u>
BUSINESS ORGANIZATIONS*	3
LITIGATION PROCEDURES*	3
Technical Electives	8 or 9
General Studies Elective	3
	17 or 18

*Courses to be developed

NOTE:

- 1. Legal Writing and Research will satisfy 3 hours of graduation requirement
- 2. General Studies Electives to be selected based upon the student's prior experience and interest. Suggested electives:

Speech 101 EDP 100 BUAD 111

3. Technical Electives to be selected from the following:



COURSE DESCRIPTIONS

- LA 11 Introduction to Legal Technology

 The role of the personnel in the legal office, ethical and professional practice standards, survey of the various fields of law, and local, state, and federal judicial systems are examined. In addition, a study of legislative history and legal terminology are included.
- LA 12 Legal Writing and Research
 A study of the law library and its use in legal research. Techniques for writing legal memoranda, case finding and briefing, and familiarization with statutes and sources of information are covered. Techniques of conducting interviews and investigations are also studied.
- LA 13 General Law I

 Miscellaneous fields of law pertaining to the law of torts, criminal law,
 liability of employers, workman's compensation laws, and federal and state
 constitutional law are studied.
- LA 14 General Law II

 Miscellaneous fields of law pertaining to commercial law, personal property, contracts, insurance, and bankruptcy are studied.
- LA 21 Government Regulations

 An examination of the principles of administrative procedures and their application in the regulations established by government. Procedures applicable to federal and state anti-trust laws, federal and state advertising laws, federal and state labeling and processing laws, and labor laws are studied. Also included is an examination of the roles of the Security Exchange Commission and federal, state, and local administrative agencies.
- LA 22 Business Organizations
 A study of the principles of the law pertaining to corporations, partnerships, and proprietorships. The law of agency is included. Dividends and other distributions that result from a business organization are covered.
- LA 24 <u>Litigation Procedures</u>

 The litigation process which involves the resolution of disputes through the use of the court system will be studied. Both civil and criminal litigation procedures will be covered.
- LA 31 Law Office Management

 Principles of management as applied to office organization, communications, interpersonal relations, planning the work load, and the utilization of financial resources are studied. Management of investigations and file preparation is included.



- LA 32 Real Estate Law and Property Transactions

 A study of the law of real property including the documents used in its transfer such as deeds, contracts, leases, and deeds of trusts. Real estate brokerage, closings, zoning, title examinations and legal descriptions are included.
- LA 33 Wills, Trusts, and Probate Administration

 Review of statutes governing probate administration, probating an estate, types of wills, trusts and applicable statutes, estate planning, and life insurance and gifts are studied.
- LA 34 Laws of Domestic Relations

 An examination of domestic relations law including divorce, separation, custody, legitimacy, adoption, guardianship, support, court procedures, and change of name.
- LA 35 Income Taxation
 A study of local, state, and federal income taxation of individuals and tax paying entities such as estates, trusts, and corporations. Emphasis is placed upon the preparation of tax returns. Also a survey of decisions concerning income tax controversies is included.
- LA 36 Industrial Relations

 A survey of labor legislation and a study of the theory and practice of collective bargaining. Topics will include the right to organize, standards of conduct, fair labor practices, arbitration, and grievances.
- LA 37 Civil and Criminal Evidence
 An examination of the rules of civil and criminal evidence and the admissibility of such evidence in court. Included is the study of clinical and circumstantial evidence.
- Criminal Justice 202 Criminal Law

 A study of the elements of criminal law and its purposes and functions. Laws of arrest, search and seizure, as well as the rights and duties of police officers and citizens are studied. The necessary elements to establish crime, criminal intent, and conspiracy are covered.
- SETR 26 Legal Terminology

 A course on legal secretarial duties, responsibilities, and terminology.

 Emphasis is placed on the preparation and filing of legal documents in the district, circuit and probate courts, including deeds, mortgages, options, wills, guardianship, civil and negligence litigation.



- English 101 Basic Communications in Writing
 Study and application of the nature, means, and purpose of communication including inquiry into conditions which affect it and practice in written and other forms of communication. Emphasis on individual thought and competence in educated usage.
- English 120 Writing Improvement

 Designed to improve basic language skills for college, for personal, and for professional use. Emphasis is on writing, grammar, usage, punctuation, spelling, and vocabulary. Learning is individualized, with programmed material. Instructional methods include class discussion, films, and short essays.
- ACCO 101A General Accounting

 The introductory principles of accounting, completing the cycle, and preparation of financial statements. Formation, operation, and dissolution of proprietorship, partnerships, and corporations.
- ACCO 101B General Accounting continued

 An introduction to accounting for assets, liabilities, manufacturing accounts and statements, source and application of funds, reserves, taxes, consolidations, analysis and interpretation of statements, and budgeting concepts.
- ACCO 252 Federal Income Tax Accounting

 Federal income tax law as it applies to the individual and the proprietorship forms of business. Recognition of items of income and deductions. Including capital gains, losses, and tax allowances.

 Prerequisite: ACCO 101A and 101B or departmental approval.
- Political Science 200 American System of Government

 A survey of national, state and local governments in theory and practice.

 Offered each semester. Not designed for majors in the social sciences. This course, or Political Science 201 and 202 required for graduation.
- Sociology 202 Social Problems

 A study of current social problems including: mental disorders, crime and juvenile delinquency, delinquent and criminal structures, drug use, alcohol and alcoholism, suicide, sexual behavior, population problems, race relations, family disorganization, poverty, community disorganization, violence, youth and politics. Prerequisite: Sociology 201 or departmental approval.
- Speech 101 Foundations of Interpersonal Communication

 The course focuses on providing the student with an experience in human communication, emphasizing the oral tradition. Emphasis is placed on becoming an effective communicator in a variety of face-to-face communication situations.



- EDP 100 Introduction to Electronic Data Processing

 An introductory course in Electronic Data Processing with emphasis upon business aspects and the relationship of data processing to the various areas in business enterprise. The student is exposed to unit record concepts, fundamental programming and computer concepts. Emphasis is placed upon familiarizing the student with the equipment, vocabulary and work flow of Data Processing.

 Lab Fee: \$2.00
- BUAD 111 Mathematics of Finance

 Simple interest, bank discount, compound interest, annuities, and fundamental statistical methods, with application of the above to business problems such as insurance, stocks and bonds, depreciation, life insurance and sinking funds.



APPENDIX E

THE LEGAL LIBRARY



APPENDIX E

THE LEGAL LIBRARY

1.	Shepard's Michigan Citations	
	3 Bound Volumes	\$ 105.00
	Annual Subscription*	57.00
2.	Michigan Reporter (covering 1-229) 85 Volumes	1,020.00
3.	Michigan Law and Practice Encyclopedia, 27 Volumes	850.00
4.	Michigan Digest, 39 Volumes	702.00
5.	Michigan Compiled Laws Annotated, 50 Volumes	1,200.00
6.	Wayne Law Review* (5 issues annually)	16.50
7.	American Jurisprudence	1,800.00 (est.)
8.	Black Law Dictionary (\$16.00 ea.) 2 copies	32.00
9.	United State's Code Annotated, 182 Volumes	1,200.00
10.	Michigan Researcher* (12 issues annually)	49.00
		\$7,031.50
	Miscellaneous Publications (estimated)	1,968.50
•	To tal	\$9,000.00

^{*}Annual Subscription Rates

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