

Standpoint Decision Support Inc. & Colorado Supreme Court Office of Attorney Regulation Counsel deliver first online lawyer self-assessment program of its kind in the US

Proactive Management-based Program (PMBP) use case study



Background

The Colorado Supreme Court's Office of Attorney Regulation Counsel, led at the time by recently retired James Coyle, embarked in 2015 on an exciting initiative to create the nation's first online lawyer self-assessment program.

The development of the program's core content involved more than 50 lawyers and several lay people, spanning 2 committees and 10 working groups. The self-assessment content comprised 10 sections of lawyer professional responsibility, and took approximately 2 years to draft.

With content in hand, the team then began the search for a suitable solution to publish the self-assessment online to Colorado's more than 40,000 lawyers, and manage it as a continuously improving program. There were many "do it yourself" platforms available which could handle some aspects of the program requirements, but none provided legal industry expertise or the depth of data analysis required to extract actionable insights from. In the end the decision was made by the Office of Attorney Regulation Counsel to engage the team of Standpoint Decision Support Inc. and their legal-sector focused online platform called AvvyPro.

Approach

There were several criteria and requirements the working team and Colorado PMBP committee desired to be met:

1. An any-device, platform-agnostic assessment tool.
2. Respondent anonymity with opt-in registration for enhanced function.
3. Industry standard data security, system technology and practices to ensure lawyer confidentiality.
4. Actionable, evidence-based reporting to inform the jurisdiction's regulatory strategy on a continuous basis.
5. Opportunity for anonymous user feedback in order to improve the online self-assessment experience.

The assessment material was standardized to ensure consistent language and an efficient question flow throughout the 10 sections. The Standpoint team created a metrics framework for all sections allowing for rigorous

analysis and the ability to benchmark and monitor both personal and jurisdiction-wide improvements on a continuous basis.

A bibliography of relevant follow up reading materials and resources was also created to provide actionable next steps for lawyers to go beyond just self-assessment, and move into a cycle of continuous professional development.

James C. Coyle told Bloomberg Law in a November 2017 article about the program “The self-assessment program is part of being proactive and helping lawyers with the necessary law office management tools.”

Results

After several rounds of testing and feedback sessions involving user groups assembled by both the courts and the Colorado Bar Association’s continuing legal education arm, the Colorado Lawyer Self-Assessment Program launched October of 2017.

Initial reaction has been quite positive, with many respondents providing comments praising the educational value of the tool and its resources, as well as constructive feedback and ideas on how to improve the program going forward.

The AvvyPro dashboard provides benefits to the regulatory team in the form of real time stats on lawyer engagement and self-assessed professional performance. Most importantly, it highlights the professional objectives scoring the highest and lowest across all respondents, providing the team with evidence to support further educational program development.

The latest version of the AvvyPro platform now has the ability to create customized lists of CLE resources based on each respondent’s own personal benchmarks and areas of need. These lists make yearly CLE planning fast and easy for lawyers, and keeps them focused on the most effective resources for their needs. As of this time the Office of Attorney Regulation Counsel has not engaged this latest platform version.

Further reading on the program can be found in this recent ABA/BNA (American Bar Association and The Bureau of National Affairs) article, published in their [Lawyers’ Manual on Professional Conduct](https://www.bna.com/colorado-goes-live-n73014472091/).
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