



Elevate Services, Inc.

May 15, 2020

Self-Assessment for Prospective Higher Education Clients

How developed is your legal operations function?

Foundational structures

Question 1a: Do you have electronic billing?

Answer/Notes:

Question 1b: Do you have a formal system for triaging work in your office?

Answer/Notes:

Question 1c: Do you have a process for determining whether client work is or should be privileged and, if so, a mechanism for conveying that to the client?

Answer/Notes:

Question 1d: Do you have any document management systems?

Answer/Notes

Question 1e: Do you have a process for utilizing contract attorneys?

Answer/Notes:

Question 1f: Is your department integrated into campus-wide IT data security systems?

Answer/Notes:

Question 1g: Do you have a document retention policy or responsibility for the management of such a policy?

Answer/Notes:

Advanced Level

Question 2a: Have you conducted an analysis of outside counsel billing?

Answer/Notes:

Question 2b: Have you conducted an analysis of the timing of the delivery of service to clients?

Answer/Notes:

Question 2c: Have you conducted an analysis of the quality of services delivered to clients?

Answer/Notes:

Question 2d: Do you have a process in place for closing out projects with clients?

Answer/Notes:

Question 2e: Have you conducted a risk assessment of potential litigation?

Answer/Notes:

Mature Functions

Question 3a: For each attorney with responsibility for a board committee, what is the nature of that attorney's engagement? Does she/he prepare agenda, review agenda, attend committee meetings, present at meetings, or prepare meeting minutes?

Answer/Notes:

Question 3b: Do you have an attorney that understands the nature of the firm's patent portfolio and can identify risk areas (or areas where patents might be infringed)?

Answer/Notes:

Question 3c: Do you have a process in place for the review of routine contracts, negotiating of contracts, storage of contracts (Sarbanes Oxley issues), monitoring of compliance with contracts, or retrieval of key information (such as choice of law and force majeure provisions) from contracts?

Answer/Notes:

Question 3d: Do you actively manage litigation to align cost and risk with mission/values/reputation?

Answer/Notes:

Question 3e: Do you have a process in place for the collection and review of documents in pre-litigation and litigation scenarios?

Answer/Notes: