



On-Demand CLE: Effective Supervision

**Effective Supervision:
How to Meet Your Ethical Duties and Support Your Team**
Lawyers Mutual of Kentucky CLE Series

Associates and nonlawyer staff provide significant contributions to the success of any firm. Supervising attorneys can support their important work through effective supervision. Over the last few years, societal workplace values have shifted, and many employees value the opportunity for professional growth and a culture of support over increases in monetary compensation. This program explores how attorneys can tap into the Kentucky Supreme Court Rules addressing supervision to not only meet one's ethical duties while also meeting the team's needs for professional growth and support.

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Courtney recently joined the Lawyers Mutual team after beginning her career in litigation. In addition to her role in client relationship management, she is focused on providing relevant risk management resources. Courtney's experience includes litigation, both criminal and civil, as well as transactional work. She has also worked in the insurance industry, training attorneys and other officials in various legal issues.

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I. What are the top three Kentucky Rules of Professional Conduct addressing supervision?

a) SCR 3.130 (5.1), Responsibilities of a partner or supervisory lawyer

- i. Establishes the duty of lawyers responsible for the overall management of the firm to ensure policies and procedures are in place “giving reasonable assurance that all lawyers in the firm conform to the Rules of Professional Conduct.”
 1. Taking affirmative steps to prevent ethical violations
 - a. Detect and resolve conflicts of interest
 - b. Identify dates by which actions must be taken in pending matters
 - c. Account for client funds and property
 - d. Client confidentiality protection measures
 - e. Ensure inexperienced lawyers are properly supervised
 - f. Must be active and ongoing
 2. Maintaining a framework and office infrastructure to ensure others in the firm follow ethical rules
- ii. Also establishes that lawyers supervising other lawyers take reasonable efforts to ensure ethical duties are met
- iii. A lawyer is responsible for the actions of another lawyer IF
 1. The lawyer orders or ratifies conduct (with knowledge) OR

2. Knows of the conduct in time to mitigate or avoid harm but takes no reasonable remedial action
- iv. Compliance with 5.1(a) is evaluated and measured under an objective standard
 1. What is reasonable—the precise measures depend on the particular firm or legal organization
 2. Informal supervision and periodic file reviews may be okay in a small firm of seasoned lawyers while more sophisticated measures will be needed in larger firms with newer lawyers or more nonlawyer personnel

b) SCR 3.130 (5.2), Responsibilities of a subordinate lawyer

- i. Clarifies that subordinate lawyers are bound by the Rules of Professional Conduct, even if directed to violate the rules
 1. Note: there is an exception if there is an “arguable question of duty”
 2. The exception is narrowly construed and rarely found to apply

c) SCR 3.130 (5.3), Responsibilities regarding nonlawyer assistants

- i. Partners and lawyers with supervisory authority over nonlawyers are responsible for ensuring their conduct is “compatible with the professional obligation of the lawyer.”
- ii. Comment (1): A lawyer *must* give nonlawyer staff appropriate instruction and supervision, particularly regarding:
 1. The obligation not to disclose information relating to the representation of the client
 2. Their work product
- iii. The supervising lawyer is responsible for the actions of a nonlawyer’s ethics violations if:
 1. The lawyer orders or ratifies conduct (with knowledge) OR
 2. Knows of the conduct in time to mitigate or avoid harm but takes no reasonable remedial action

II. What other rules address supervision of paralegals or nonlawyer staff?

a) SCR 3.700, Provisions relating to paralegals

- i. This rule specifically addresses paralegals and their role in the law firm
- ii. Key points of SCR 3.700:
 1. Direct supervision of a paralegal by a licensed lawyer is required.
 2. A lawyer must ensure that a paralegal does not engage in the unauthorized practice of law.
 3. It must be made clear to a client that a paralegal is not a lawyer.
 4. The lawyer must remain fully responsible for the representation.
 5. The lawyer must instruct a paralegal to preserve the confidences and secrets of a client.
 6. The Kentucky Rules of Professional Conduct are not binding on lay personnel.

b) SCR 3.130 (5.4), Professional independence of a lawyer

- i. Lawyers are prohibited from sharing fees with nonlawyers
- ii. Note: an exception allows a firm to include nonlawyers in a compensation or retirement plan

c) SCR 3.130 (5.5), Unauthorized practice of law

- i. The comment to this rule makes it clear that it does not prohibit delegating functions to paraprofessionals provided the lawyer supervises the work and retains full responsibility for that work

III. Ethical Considerations in Managing Paralegals and Nonlawyer Staff

a) Delegating and Supervising Work

- i. If the delegation involves the exercise of independent legal judgment or counseling clients on legal issues, then the delegation has gone too far.

b) Nonlawyer New Client Reception and Screening

- i. Instruct nonlawyers to make it clear to the potential client that they are not a lawyer and cannot commit the supervising lawyer to accept the client. Failure to do so could lead nonclients into believing they are represented by the firm.

c) Client Confidentiality

- i. An ironclad office rule must be that firm business is never discussed outside the office other than in the furtherance of the client's case. This policy forbids discussing firm activities with family, friends, relatives of clients, or anyone else.
- ii. The team must also be trained to be sensitive to discussing client matters in the office in open areas or other places in the office where conversation can be overheard.
- iii. Client files and information must be put out of sight when not in use and should not be left displayed on desks, even for brief absences.
 1. Remember to do a quick check and put away client files prior to any video conferencing.
 2. Be mindful of copiers, faxes, computer screens, and other communication devices in common areas and ensure visitors to the office cannot access view documents (or hear conversations) containing client information.
- iv. If your firm uses temporary employees, extra care must be taken to ensure they understand the importance of client confidentiality. Temporary employees should also be screened from office matters outside the scope of their limited role in the office.

d) Conflict of Interests

- i. Generally, the rules regarding conflicts of interest do not extend to nonlawyer staff. However, lawyers should instruct everyone in the office, both lawyers and nonlawyer staff, to report potential conflicts.

- ii. KBA E-308 (1985) provides guidance for when a paralegal leaves a firm to work at a firm that is opposing counsel in several cases against their former firm. The former employer firm should:
 - 1. Debrief departing paralegal
 - 2. Inform hiring firm of debrief
 - 3. Request hiring firm screen former employee
 - 4. Request hiring firm instruct paralegal not to reveal confidences
 - 5. Request hiring firm to advise if breach
 - 6. Request hiring firm to withdraw if breach
 - 7. Get written assurances from hiring firm
 - 8. Advise affected clients of paralegal's change in employment
 - 9. Move to disqualify hiring firm if client so requests
- iii. Lawyers risk disqualification, bar discipline, and malpractice claims for failing to identify and properly address conflicts. Nonlawyers risk employee discipline, termination, and legal action by the aggrieved party.

e) Giving Legal Advice

- i. If clients press for legal advice, the nonlawyer must politely decline to do so but let them know you will pass along their question(s) to the lawyer who will reach out to them, shortly.

f) Financial Management

- i. Common errors in client trust account management include:
 - 1. Failure to internally reconcile trust account for each client
 - 2. Account contains funds other than client funds and the lawyer funds required to cover bank fees
 - 3. Source of funds not identified
 - 4. Checks including trust and non-trust funds not deposited into trust account
 - 5. Failure to indicate from which client funds are drawn
 - 6. Clients current balance not indicated
 - 7. Checks made payable to cash

ii. *In re Cater* (887 A.2d 1 (2005)) provides an example of what can happen when a nonlawyer staff member is managing client funds without proper training or supervision. Here, a solo practitioner served as guardian for estates of incapacitated adults. Her administrative assistant took over management of the accounts and proceeded to steal over \$50,000. The court provided an analysis of what is required in supervising a nonlawyer (*quotations omitted*):

1. Careful selection of employee
2. Appropriate training
3. Proper supervision
4. A system of timely review and internal controls to provide reasonable assurance that the supervising lawyer will learn whether the employee is performing the delegated duties honestly and competently (*particularly in matters such as maintenance of financial records or handling of client funds*)
 - a. *The court noted a failure to have the systems in place did not allow the lawyer to profess ignorance of the employee's dishonesty or incompetence*
5. Factors that determine the types of controls and review required include:
 - a. the nature, extent and complexity of the delegated tasks
 - b. the experience, skills, and training of the employee
 - c. the perceived or foreseeable risks and vulnerabilities
 - d. the circumstances under which the tasks are to be performed
 - e. the feasibility, cost and likely effectiveness of alternative internal control measures, and the overall work environment
6. The court noted that, "responsible supervision does not mean that the lawyer must duplicate the employee's work or

scrutinize and regulate it so closely that the economic or other advantages of the delegation are lost. Rule 5.3(b) requires ‘reasonable efforts,’ not overkill. Reasonable controls and review need not be overly intricate or unduly burdensome.”

- a. In this matter, the court noted simply securing the checkbooks and reviewing monthly statements periodically would have been sufficient.

g) Letterhead

- i. SCR 3.700 Provisions relating to paralegals: Sub-Rule 6 provides that the letterhead of a lawyer may include the name of a paralegal where the paralegal’s status is clearly indicated: A lawyer may permit his name to be included in a paralegal’s business card, provided that the paralegal’s status is clearly indicated.

h) Employing Disbarred or Suspended Lawyers

- i. *“It seems clear to the Ethics Committee that an attorney who hires a suspended, disbarred, or resigned attorney does so at the attorney’s own risk. If the previous lawyer engages in any unauthorized practice, the lawyer employing that person will be guilty of unprofessional conduct and will be appropriately disciplined by the Supreme Court of Kentucky.”* (KBA E-255)
- ii. KBA Formal Ethics Opinions E-255 (1981), E-256 (1981), and E-336 (1989) provide guidance.
- iii. Generally, a suspended lawyer may not perform paralegal duties for a lawyer during the stated period of suspension.
 1. This includes a prohibition of client contact or having an office in the law firm during the period of suspension.
- iv. The opinions do not explicitly state whether there is a time that a disbarred attorney could eventually perform paralegal duties. Since disbarment is permanent, the prohibition on paralegal duties may be, as well.

IV. Shared Offices, Shared Staff, and Ethical Considerations

a) KBA Formal Ethics Opinion E-406

- i. Sharing administrative staff is not forbidden
- ii. The risk of improper disclosure of confidential information with shared administrative staff is so great that sharing administrative staff should be avoided.

b) KBA Formal Ethics Opinion E-417:

- i. “Neither a shared receptionist nor any other shared staff may handle confidential client information.”

c) Training Office Share Staff

- i. All office-share lawyers are ultimately responsible for training their staff and common staff on client confidentiality and other professional responsibility requirements.
- ii. All confidential information must be stored separately with complete non-access by others in the shared office.
- iii. Computer systems should not be networked in the office. Each practice should use a stand-alone system.
- iv. Each practice should maintain its own conflict of interest check system.
 1. Check for conflicts with other lawyers at the time the office-share begins and thereafter for all new clients and matters.
 2. Office-share lawyers should agree to not represent adverse interests unless informed written consent from both clients is obtained.
- v. Staff answering shared phones must be trained to answer in a way that avoids giving the impression of a partnership.
 1. *Note: The best practice is to have separate phone lines.*
- vi. Shared staff should be trained how to answer questions about who employs them

V. **Establishing Risk Management Procedures**

- a) **Recognize Red Flags.** Be aware that supervisory and nonlawyer ethics and malpractice problems can come up in unanticipated ways that are easy to overlook. Examples include:
- i. No appreciation of the duties required under rules 5.1-5.3
 - ii. An absence of work control systems such as client intake procedures, calendaring, file review, etc.
 - iii. Reliance on loose, informal, and casual office contact to monitor ethics and malpractice issues
 - iv. No written procedures for supervising subordinate lawyers and nonlawyers
 - v. Too much delegation to nonlawyers without heightened close supervision
 - vi. Failure to closely monitor client trust account management
 - vii. Systemic risks to ethics compliance because of firm compensation and productivity policies
 1. For example, too high billable hour requirements and overleveraging; depending on too many inexperienced lawyers and too many nonlawyers to provide service
 - viii. Inadequate or no continuing ethics training programs for inexperienced lawyers, newly hired nonlawyers, and the firm as a whole
 - ix. Relying too much on mandatory CLE to comply with Rules 5.1-5.3
 - x. Employing a disbarred or suspended lawyer as a paralegal or office staff
 - xi. Sharing nonlawyer employees in shared office practices
 - xii. Allowing nepotism, sexual harassment, and office romantic entanglements to derail otherwise good supervisory practices
 - xiii. Not recognizing that independent contractors providing services for the firm require the same supervision for ethics compliance as members of the firm

- xiv. Not giving temporary hires and summer interns adequate instruction on ethics compliance requirements

b) Recognize the liability.

- i. Firm lawyers are fully responsible for the work product of the office nonlawyer staff. Any nonlawyer error or omission will likely constitute malpractice by the supervising lawyer. A lawyer who is casual in reviewing research and document preparation by support staff is particularly vulnerable.
- ii. Paralegals are not immune from suit for negligence. (See *Crawford Law Offices, PLLC, et. al.* (E. D. Ky. December 6, 2010) where the court refused to dismiss negligence and fraud claims against a paralegal)

c) Develop an office Risk Management Program that includes

- i. Employment hiring procedures that screen candidates for good character and high ethical standards.
- ii. Office procedures that cover (and notes who is responsible for):
 - 1. Client intake
 - 2. Conflict checks
 - 3. Confidentiality protection measures
 - 4. Docket and work control
 - 5. File review
 - 6. Safeguarding client property
 - a. billing
 - b. client trust account management
 - 7. Internal controls
 - 8. Supervision procedures
 - a. specific references to duties owed under 5.1 and 5.3
 - b. guidance on the standards to be met by firm members
 - 9. Instructions on how to report ethics and malpractice issues to firm management for resolution.

- a. Courts have applauded those firms who have a designated person to whom lawyers can report problems or concerns

10. Risk management

- iii. Regular review of and discussion of the office procedures
 1. It is not enough to have office procedures that are never followed or referred to.
 2. Law firms must be taking active and ongoing steps to prevent and detect unethical conduct.
 - a. See *KBA v. Weinberg*, where partners failed to maintain institutional controls (no tickler systems, no periodic file reviews, no diary systems)
- iv. Training for New Staff
 1. Mentoring program
 2. Clear supervisory structure
 3. [Core competencies checklist](#)
 4. Case handling guidelines
- v. Firm sponsored education programs on a recurring basis (at least annual) for all members of the firm reinforcing professional responsibility compliance and risk management.
- vi. Clear lines of supervisory responsibility so that both the supervisor and supervised understand their duties and accountability.
- vii. Implement consistent discussions between supervisors and supervisees
 1. Regular check-ins
 2. More in-depth case reviews (a case audit)
 3. Attend court with supervisees
 4. Work to maintain good supervisor relationships
 5. Identify CLE opportunities that meet firm and individual needs

Employee Retention Resources

- **3 Golden Rules to Retaining Associates**, Dal Bhathal, *The Counsel Network*
 - “An alarming number of exiting Associates unhappily recount their struggles to understand the work expectations, billing structure, compensation structure, reward program, mentorship program, governance model, culture, values, and goals of their former employer. Taking the opportunity to clearly outline and reinforce these fundamental concepts on an ongoing basis will alleviate potential frustrations and effectively teach Associates how to best develop their future careers.”
 - <https://www.thecounselnetwork.com/3-golden-rules-to-retaining-associates/>
- **Law Firms facing several key factors—beyond money—in competing for legal talent, says new report**, *Thomson Reuters*
 - “...overall, lawyers at Stay firms expressed higher levels of satisfaction with their current firms in such key areas as being treated fairly, ability to be one’s self, firm management, reward and compensation, and opportunities for career and personal growth.”
 - <https://www.thomsonreuters.com/en-us/posts/legal/law-firms-stay-go-report-2022/>
- **Law Firms competing for talent in 2022**, Thomson Reuters
 - <https://www.thomsonreuters.com/en/reports/law-firms-competing-for-talent-in-2022.html>
- **2022 Report on the State of the Legal Market**, Thomson Reuters
 - <https://www.thomsonreuters.com/en-us/posts/legal/state-of-the-legal-market-2022/>

Kentucky Supreme Court Rules

SCR 3.130(5.1) Responsibilities of partners, managers and supervisory lawyers

- (a) A partner in a law firm, and a lawyer who individually or together with other lawyers possesses comparable managerial authority in a law firm, shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that all lawyers in the firm conform to the Rules of Professional Conduct.
- (b) A lawyer having direct supervisory authority over another lawyer shall make reasonable efforts to ensure that the other lawyer conforms to the Rules of Professional Conduct
- (c) A lawyer shall be responsible for another lawyers violation of the Rules of Professional Conduct if:
 - 1) the lawyer orders or, with knowledge of the specific conduct, ratifies the conduct involved; or
 - 2) the lawyer is a partner or has comparable managerial authority in the law firm in which the other lawyer practices, or has direct supervisory authority over the other lawyer, and knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action.

SCR 3.130(5.2) Responsibilities of a subordinate lawyer

- (a) A lawyer is bound by the Rules of Professional Conduct notwithstanding that the lawyer acted at the direction of another person.
- (b) A subordinate lawyer does not violate the Rules of Professional Conduct if that lawyer acts in accordance with a supervisory lawyer's reasonable resolution of an arguable question of professional duty.

SCR 3.130(5.3) Responsibilities regarding nonlawyer assistants

With respect to a nonlawyer employed or retained by or associated with a lawyer:

- (a) a partner, and a lawyer who individually or together with other lawyers possesses comparable managerial authority in a law firm shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that the person's conduct is compatible with the professional obligations of the lawyer;

- (b) a lawyer having direct supervisory authority over the nonlawyer shall make reasonable efforts to ensure that the person's conduct is compatible with the professional obligations of the lawyer; and
- (c) a lawyer shall be responsible for conduct of such a person that would be a violation of the Rules of Professional Conduct if engaged in by a lawyer only if:
 - 1) the lawyer orders or, with the knowledge of the specific conduct, ratifies the conduct involved; or
 - 2) the lawyer is a partner or has comparable managerial authority in the law firm in which the person is employed, or has direct supervisory authority over the person, and knows of the conduct at a time when its consequences can be avoided or mitigated but fails to take reasonable remedial action.

SCR 3.130(5.4) Professional independence of a lawyer

- (a) A lawyer or law firm shall not share legal fees with a nonlawyer, except that:
 - 1) an agreement by a lawyer with the lawyer's firm, partner, or associate may provide for the payment of money, over a reasonable period of time after the lawyer's death, to the lawyer's estate or to one or more specified persons;
 - 2) a lawyer who purchases the practice of a deceased, disabled, or disappeared lawyer may, pursuant to the provisions of Rule 1.17, pay to the estate or other representative of that lawyer the agreed-upon purchase price;
 - 3) a lawyer or law firm may include nonlawyer employees in a compensation or retirement plan, even though the plan is based in whole or in part on a profit-sharing arrangement; and
- (b) A lawyer shall not form a partnership with a nonlawyer if any of the activities of the partnership consist of the practice of law.
- (c) A lawyer shall not permit a person who recommends, employs, or pays the lawyer to render legal services for another to direct or regulate the lawyer's professional judgment in rendering such legal services.
- (d) A lawyer shall not practice with or in the form of a professional corporation or association authorized to practice law for a profit, if:

- 1) a nonlawyer owns any interest therein, except that a fiduciary representative of the estate of a lawyer may hold the stock or interest of the lawyer for a reasonable time during administration;
- 2) a nonlawyer is a corporate director or officer thereof or occupies the position of similar responsibility in any form of association other than a corporation; or
- 3) a nonlawyer has the right to direct or control the professional judgment of a lawyer.

SCR 3.130(5.5) Unauthorized practice of law; multijurisdictional practice of law

- (a) A lawyer shall not practice law in a jurisdiction in violation of the regulation of the legal profession in that jurisdiction, or assist another in doing so.
- (b) A lawyer who is not admitted to practice in this jurisdiction shall not:
 - 1) except as authorized by these Rules or other law, establish or maintain an office or other presence in this jurisdiction for the practice of law; or
 - 2) hold out to the public or otherwise represent that the lawyer is admitted to practice law in this jurisdiction.
- (c) A lawyer admitted in another United States jurisdiction, and not disbarred or suspended from practice in any jurisdiction, may provide legal services on a temporary basis in this jurisdiction if such services:
 - 1) comply with SCR 3.030(2), or they do not require compliance with SCR 3.030(2) due to federal statute, rule or regulation; or
 - 2) are in, or reasonably related to, a pending or potential proceeding before a tribunal or alternative dispute resolution proceeding in another jurisdiction for a client, or prospective client pursuant to Rule 1.18, if the services arise out of, or are reasonably related to, the lawyer's practice in a jurisdiction in which the lawyer is admitted to practice and are not services for which the forum requires pro hac vice admission pursuant to SCR 3.030(2); or
 - 3) are not within paragraph (c) (2) and arise out of, or are reasonably related to, the representation of the lawyer's client in the jurisdiction in which the lawyer is admitted.

(d) A lawyer admitted in another United States jurisdiction, and not disbarred or suspended from practice in any jurisdiction, may provide legal services in this jurisdiction that:

- 1) comply with SCR 2.111 regarding a Limited Certificate of Admission to Practice Law in this jurisdiction; or
- 2) are services that the lawyer is authorized to provide by federal law or other law of this jurisdiction.

(e) A lawyer authorized to provide legal services under this Rule shall be subject to the Kentucky Rules of Professional Conduct and shall comply with SCR 3.030(2) or, if such legal services do not require compliance with that Rule, the lawyer must actively participate in, and assume responsibility for, the representation of the client.

Supreme Court Commentary

...

(2) ... This Rule does not prohibit a lawyer from employing the services of paraprofessionals and delegating functions to them, so long as the lawyer supervises the delegated work and retains responsibility for their work. See Rule 5.3.

SCR 3.700 Provisions relating to paralegals

PRELIMINARY STATEMENT: The availability of legal services to the public at a price it can afford is a goal to which the Bar is committed, and one which finds support in Canons 2 and 8 of the Code of Professional Responsibility. The employment of paralegals furnishes a means by which lawyers may expand the public's opportunity for utilization of their services at a reduced cost.

For purposes of this rule, a paralegal is a person under the supervision and direction of a licensed lawyer, who may apply knowledge of law and legal procedures in rendering direct assistance to lawyers engaged in legal research; design, develop or plan modifications or 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.

PURPOSE: Rapid growth in the employment of paralegals increases the desirability and necessity of establishing guidelines for the utilization of paralegals by the legal community. This rule is not intended to stifle the proper development and expansion of

paralegal services, but to provide guidance and ensure growth in accordance with the Code of Professional Responsibility, statutes, court rules and decisions, rules and regulations of administrative agencies, and opinions rendered by committees on professional ethics and unauthorized practice of law.

While the responsibility for compliance with standards of professional conduct rests with members of the Bar, a paralegal should understand those standards. It is, therefore, incumbent upon the lawyer employing a paralegal to inform him of the restraints and responsibilities incident to the job and supervise the manner in which the work is completed. However, the paralegal does have an independent obligation to refrain from illegal conduct. Additionally, and notwithstanding the fact that the Code of Professional Responsibility is not binding upon lay persons, the very nature of a paralegal's employment imposes an obligation to refrain from conduct which would involve the lawyer in a violation of the Code.

SUB-RULE 1

A lawyer shall ensure that a paralegal in his employment does not engage in the unauthorized practice of law.

SUB-RULE 2

For purposes of this rule, the unauthorized practice of law shall not include any service rendered involving legal knowledge or legal advice, whether representation, counsel or advocacy, in or out of court, rendered in respect to the acts, duties, obligations, liabilities or business relations of the one requiring services where:

- A. The client understands that the paralegal is not a lawyer;
- B. The lawyer supervises the paralegal in the performance of his duties; and
- C. The lawyer remains fully responsible for such representation, including all actions taken or not taken in connection therewith by the paralegal to the same extent as if such representation had been furnished entirely by the lawyer and all such actions had been taken or not taken directly by the lawyer.
- D. The services rendered under this Rule shall not include appearing formally in any court or administrative tribunal except under Sub-rule 3 below, nor shall it include questioning of witnesses, parties or other persons appearing in any legal or administrative action including but not limited to depositions, trials, and hearings.

SUB-RULE 3

For purposes of this Rule 3.700, the unauthorized practice of law shall not include representation before any administrative tribunal or court where such service or representation is rendered pursuant to a court rule or decision which authorizes such practice by nonlawyers.

SUB-RULE 4

A lawyer shall instruct a paralegal employee to preserve the confidences and secrets of a client and shall exercise care that the paralegal does so.

SUB-RULE 5

A lawyer shall not form a partnership with a paralegal if any part of the partnership's activities consists of the practice of law, nor shall a lawyer share on a proportionate basis, legal fees with a paralegal.

SUB-RULE 6

The letterhead of a lawyer may include the name of a paralegal where the paralegal's status is clearly indicated: A lawyer may permit his name to be included in a paralegal's business card, provided that the paralegal's status is clearly indicated.

SUB-RULE 7

A lawyer shall require a paralegal, when dealing with a client, to disclose at the outset that he is not a lawyer. A lawyer shall also require such a disclosure when the paralegal is dealing with a court, administrative agency, attorney or the public, if there is any reason for their believing that the paralegal is a lawyer or is associated with a lawyer.



CLE: Effective Supervision

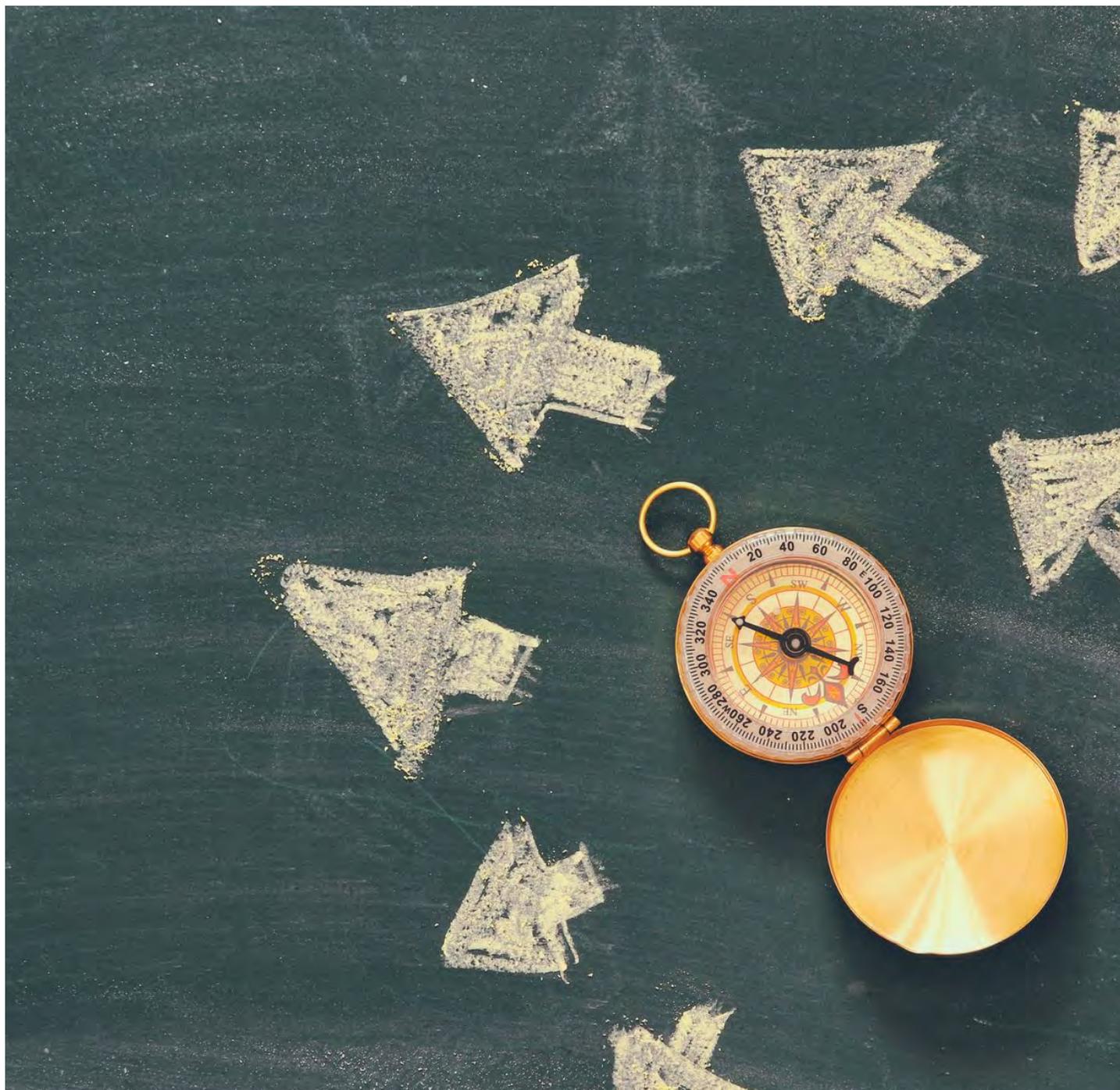
Effective Supervision: How to Meet Your Ethical Duties and Support Your Team *Additional Resources*

Harvard Business Review: [How Leaders Can Open Up to Their Teams Without Oversharing](#), Liz Fosslien and Mollie West Duffy

- “[Research shows](#) our brains respond positively to people when we feel a personal connection with them. We try harder, perform better, and are kinder to our colleagues. Command and control management is on its way out, and bosses who practice empathy and make an effort to connect **with their subordinates are in.**”
- “We [recommend] be[ing] *selectively vulnerable* — or open up to your team while still prioritizing their boundaries, as well as your own.”
- “Provide a path forward: ... ‘Because of _____, I’m feeling _____ and _____. But here’s what I’m planning to do next to make it better: _____. And here’s what I need from you: _____. What do you need from me?’”

First Round Review: [The Best Managers Don’t Fix, They Coach – Four Tools to Add to Your Toolkit](#), Anita Hossain Choudhry and Mindy Zhang

- “[O]ver-relying on fixing constrains our ability to lead and robs our team members of growth opportunities.”
- “As a result, many managers get overwhelmed with responsibilities and burn out.”
- “Great managers know they need to invest in the long game: building a team that is constantly growing, feels empowered to drive results, and reaches higher levels of performance.”
- [Daniel Goleman study](#) identified six leadership styles: Commanding, Visionary, Affiliative, Democratic, Pacesetter, and Coaching
 - “[C]oaching was rated as leaders’ least preferred style, even though it correlates with positive team dynamics.”
- “We define coaching as getting someone from where they are to where they want to go by tapping into their own wisdom and keeping them accountable to achieving their goals.”
- “[B]y adopting a fix-it management approach, she was trying to get her direct report to use her compass to define success — and as a result, the employee was no longer connecting with the work that had her so excited in the beginning.”
- Coaching leads to two things:
 - We invest in their inner teacher
 - We empower them to trust themselves



Management

The Best Managers Don't Fix, They Coach — Four Tools to Add to Your Toolkit



The authors are [Vikram Venkatesh Choudhry](#) and [Jimmy Zhang](#), who have coached hundreds of managers. Hossain Choudhry is CEO at [The Grand](#), a group coaching platform to support managers in making leadership decisions. She's also an executive coach (formerly at [Reboot.io](#)) and previously the Head of Knowledge at First Round Capital. Zhang is a former product leader at [Dropbox](#) and at [Oscar Health](#), and is now an executive coach at [Throughline](#) and [The Grand](#).

Think about your typical week as a manager. How many times did you help your direct reports by trying to solve their problem? The answer is probably as many times as you met with them. While that's common among managers, it's not always optimal.

Too often, managers feel the best way to add value is by fixing someone's problem. "I know the answer, and I need to tell them," we say to ourselves. But over-relying on fixing constrains our ability to lead and robs our team members of growth opportunities.

As a result, many managers get overwhelmed with responsibilities and burn out. They create a team culture in which they're expected to have the answers. And their direct reports — instead of utilizing their talents and stretching their problem-solving skills — become dependent on their managers to do their jobs.

Managers are not solution vending machines. They're not paid to give answers.

Great managers know they need to invest in the long game: building a team that is constantly growing, feels empowered to drive results, and reaches higher levels of performance.



style or shift their approach — many bring the best of intentions, but frankly, simply end up winging it.

But if they aren't aware of it, most managers default to a single approach. Daniel Goleman, a psychologist and leadership author, [studied](#) 3,871 executives and identified six leadership styles: Commanding, Visionary, Affiliative, Democratic, Pacesetter, and Coaching. What he found was that the most effective leaders didn't over-rely on a single style; they had mastered multiple styles and could skillfully match the right style to a situation.

Similarly, as a manager, you have a toolbox of skills, styles, and competencies to pull from. In order to be the best manager possible, you need to: (a) assemble a diverse and varied toolbox, and (b) wisely select the tool that will be most useful in a given situation.

As executive coaches, we've worked with hundreds of startup managers. We've seen first-hand that coaching is one of the least utilized and yet most effective management tools. (In fact, in Goleman's research, coaching was rated as leaders' least preferred style, even though it correlates with positive team dynamics.) By adding coaching to your toolbox and calling upon it in the right situations, you can uncover your team's blind spots, help your direct reports grow into more capable leaders, and ultimately, enable your team's best work.

In this article, we'll unpack why managers fall into the fixing trap and dig into the fundamentals of coaching, sharing four actionable tools you can start using immediately. We'll distill the highlights of what we've learned in years of coaching training — all adapted to everyday management scenarios so you can see how to practically put them to use.

THE DEFAULT APPROACH: FIXING



"To be honest, I haven't been feeling motivated at work. I tend to be bogged down in execution details, and I'm not getting enough exposure to strategy. I look around, and my peers are working on strategic projects that move their careers forward."

How would you approach it? Most managers start scanning for problems. Once they've identified a problem, they jump straight to fixing it. Take this example of the manager (Rachel) and her direct report (Ana). If Rachel uses a fixing approach, here's how that conversation might go:

The default approach: Fixing

Ana

To be honest, I haven't been feeling motivated at work. I tend to be bogged down in execution details, and I'm not getting enough exposure to strategy. I look around, and my peers are working on strategic projects that move their careers forward.

Rachel

Thanks for sharing that with me. I remember when I was at your level and looking to get promoted. What was most valuable was focusing on execution. I rolled up my sleeves, focused on executing the projects in front of me, and that's what got me promoted to where I am now. You have mission critical projects to execute, so you're already on the right path.

Ana

But that's exactly the problem I'm facing. I'm spending all my time on execution and not enough time on the strategic problem solving I see other product managers doing.



What did you notice about the conversation above?

First, the manager started with **advice from her own experience**. She assumed that her direct report was asking for strategic opportunities in order to get promoted, and that sharing lessons from her own career advancement would be relevant. While those assumptions might be true, it's also possible that her direct report has a different "why" behind the ask — for example, acquiring a new skill, gaining confidence, or charting the course for a different career path.

Second, the manager **prescribed solutions** — creating a competitive analysis slide,



difficult, entitled, and not focused enough on their core role. The direct report leaves feeling unheard and dismissed.

We've encountered this very situation in our own careers. When Anita was managing several people who had just graduated from college, she reflected on her own first job — and was reminded of a manager who was unclear and didn't offer the right level of support. Vowing to do the opposite, when a direct report came to her struggling to prioritize everything on her plate, Anita immediately jumped into fix-it mode, getting super prescriptive.

She told her to take a sheet of paper, draw a triangle on it, and then break it up into thirds. In the bottom of the triangle, Anita wrote down 3-5 things her report should work on for the week. Next, she outlined three things for the next three days in the middle section, and the one thing that she needed to complete before she left the office for the day at the top of the triangle. Anita did this for her direct report every day for several weeks, thinking she had solved her problem. Oftentimes, Anita would also look at that triangle and take a few things off of her plate and just do it for her, trying to lighten the load. Yet the direct report's creativity started to wane as she spent long hours trying her best to get those critical tasks done.

Why managers are prone to fixing:

Situations like this are common in manager-report relationships. When a manager adopts a fixing approach, they assume that:

1. Their experiences are relevant to the other person's situation.
2. They know the other person's problem well enough to prescribe advice.



situations, jumping straight to fixing causes (a) a misinformed solution that makes the problem worse, (b) a band-aid solution that temporarily soothes the wound but doesn't solve the deeper issue, and/or (c) a long-term dependence on the manager to fix all problems, thereby depriving the direct report of opportunities to grow and solve their own challenges.

Why do managers instinctively dive into fixing? Two big reasons:

We think we know: We got promoted into managerial roles from senior individual contributor (IC) positions because we excelled at building our expertise and swiftly applying it to solve problems. We're wired to think, "I know the answer and can add value here" and jump into action.

We think we *should* know: Many managers (particularly those who are new to managing people) experience imposter syndrome. They might think, "I should know the right answer. Otherwise, if I don't, I'm a bad manager." To protect our own credibility, we take on immense pressure to fix problems.

Being the hero who swoops in and relieves someone of their problems feels good, and it's hard to let go of the chance to reinforce our competence.



Mindy Zhang, former product leader at Dropbox & Oscar Health, and current executive coach at Throughline & The Grand.

Many have had brushes with that second one in particular. When Mindy became a people manager at Dropbox in her mid-20s, she battled imposter syndrome as she managed people with up to a decade more experience. Whenever a direct report came to her with a challenge, a negative talk track kicked in. She thought: "I need to solve this problem for them, *now*. Because if I don't... Well, they'll know that I'm faking it. That I'm not a real product leader."

As a result, she often overworked herself solving team members' problems, and most of the time, her solutions were misinformed because she didn't have full context. A wake-up call came while working with an executive coach who did a round of in-depth 360 feedback that scored her across dimensions of leadership. "Keeping talented people challenged" was her lowest score. Mindy realized that the amazing product managers she was hiring were joining her team so that their strengths and expertise could shine, not so she could take on their problems.

THE ALTERNATIVE APPROACH: COACHING



Of course, this term is still a bit fuzzy, especially in the startup world, where coaching can take many forms. We define coaching as getting someone from where they are to where they want to go by tapping into their own wisdom and keeping them accountable to achieving their goals.

To put it simply: Coaching is a skill, while being a manager is a role.

The key element is tapping into *their own* wisdom, not *your* wisdom. When we constantly support our teams using our wisdom, we are hyper-focused on solving the problem at hand based on our past experiences and learnings.





Returning to Anita's own management example, an "aha" moment arrived during her first coaching certification course. One of the training sessions talked about how we often live our lives according to someone else's compass. Only through deep inquiry and by asking open and honest questions can we know [our own compass](#). Anita realized that by adopting a fix-it management approach, she was trying to get her direct report to use her compass to define success — and as a result, the employee was no longer connecting with the work that had her so excited in the beginning.

In their next 1:1, Anita instructed her direct report to take the lead filling out that triangle. To aid in the process, she asked open and honest questions about what type of work her team member was most drawn to and where she saw opportunities for the firm to grow. By taking a coaching stance, Anita helped her trust her intuition and develop her own compass. In turn, this allowed the direct report to come up with some of the most creative ideas deployed at the company, returning to the vibrant and innovative person Anita had hired in the first place.

When we instead use coaching to unearth someone's own wisdom, two things happen:

We invest in their inner teacher: This means that you're not just solving a one-time problem; you're helping them see patterns and behaviors so that going forward, they can develop their own resources and best practices to navigate their challenges.

We empower them to trust themselves: You'll see a shift in your team member's ability to more clearly and confidently articulate next steps they can take to solve a problem or achieve their goal.



essential to start coaching your direct reports: Empathetic Listening and Open and Honest Questions

To highlight empathetic listening, we need to start by defining the opposite of empathetic listening, which is self-focused listening. We've all been there before. Whether it's in a 1:1 with a direct report or a cross-functional meeting, we often listen to other people in order to answer one question: *What does this mean for me?*

We are listening to react and respond: *What should I say next? What conclusion should I draw? How should I interpret this? What does this person need from me? How do I help them figure this out?*

This is a natural human reaction because our brains are designed for pattern matching and problem solving — which can be quite useful in many parts of our lives. Instead, we recommend that managers use empathetic listening.

Empathetic listening means shifting from "What does this mean for me?" to "What's going on for this person?"

At its core, empathetic listening is:

Listening to understand another person's experience: *What's going on for them? What are they thinking, feeling, and experiencing?*



With this insight, we unlock previously hidden information that enables us to better guide the other person. It's important to clarify that empathetic listening is not:

Feeling the same feelings as someone else — this can lead to taking on other people's distress, a significant cause of burnout among managers.

Comparing the other person's experience to your own.

The second foundational skill of coaching as a leader is asking open and honest questions. Generally, questions can be closed or open. A closed question limits how the other person can respond.

For example:

Do you want to answer that question with a survey or with user interviews?

Are you OK with this new process we're putting in place?

Have you thought about doing X to solve the problem?

Sometimes, this approach can be useful. For example, if we need to make a fast decision on an urgent issue, we may not have the time to explore the full range of possibilities.



honest question is if you say yes to the following list:



I don't know the answer to the question.



I don't have a preferred answer.



I'm not trying to steer the person in a particular direction.

The difference between closed and open questions



Closed questions

Limits how the other person can respond

Examples:

- Do you want to answer that question with a survey or with user interviews?
- Are you OK with this new process we're putting in place?
- Have you thought about doing it this way?



Open & Honest questions

Expands the set of possible responses

Examples:

- What approach could you take to answer that question?
- What would your ideal process look like?
- What are some ways you could approach the problem?





we'll outline a practical scenario, flag what the fixing approach looks like, and share tips for applying the coaching technique instead.

Four coaching tools for managers



Outcome shift

When to use it: A team member is spinning on a problem; a disagreement with a colleague or running into an unexpected constraint in their project.



Options exploration

When to use it: You understand your team member's challenge and what they would like to see happen.



Acknowledging strengths

When to use it: A team member has imposter syndrome or doesn't feel confident in their ability to tackle a challenge.



Uncovering limiting beliefs

When to use it: A team member has unconscious assumptions that might be holding themselves or someone on their team back.

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Coaching Tool #1: Outcome Shift

When to use it: A team member is spinning on a problem — for example, an unexpected constraint in their project. They've thought about it, but are stuck on how to proceed.

If you took the fix-it approach, you might default to saying: Why is this happening?



without knowing what they want, they can't move towards it. Coaching can help them shift them from the problem to the solution, so they can start mapping out the path from A to B.

How to apply this tool:

"In this situation, what would you like?" (Repeat this back to the other person to make sure you heard correctly)

"What will having that do for you?" (This question helps them dig one level deeper on what they're solving for)

Pro-tips to keep in mind:

Repeat the second question as many times as you need until you get to the core of what your direct report wants out of the situation.

Use the exact wording of the questions. For example, saying "will" instead of "might" presupposes that your direct report will achieve this goal in the future and puts them in a mindset to do so.

If what your direct report wants isn't tractable — for example, they want a difficult colleague removed from the team — you can explain why it's not feasible, then ask: "Let's keep exploring to see if there's another possibility. Given the way things are, what else would you like?"



When to use it: You understand your team member's challenge and what they would like to see happen. You want to partner with them to solve it.

If you took the fix-it approach, you might default to saying: Have you tried doing X? I can step in and take this on for you.

Here's why you should use coaching instead: Your direct report may have context and ideas that you don't have. Instead of immediately suggesting what you would do, coaching empowers your team members to solve their own challenges.

How to apply this tool: Ask clarifying questions that help make the options more concrete, such as "What options do you have to make progress toward that outcome?" or "What other options do you have?" or "What do you want to try first?"

For example, say your direct report is relying on the Creative team to fulfill a key dependency before they can move forward with a campaign. The designer they work with hasn't shared any updates, and your team member is worried about the project status. You could ask: "What options do you have?" and have your direct report come up with their own ideas *before* you share any feedback.

Coaching Tool #3: Acknowledging Strengths

When to use it: A team member has imposter syndrome or doesn't feel confident in their ability to tackle a challenge.

If you took the fix-it approach, you might default to saying:

"Don't worry, you got this!"



“Have more confidence in yourself!”

Here's why you should use coaching instead: Cheerleading often intensifies imposter syndrome because it widens the gap between lofty expectations and where the person sees their own capabilities. In coaching, we increase someone's confidence by bringing awareness to their specific gifts — this helps them understand how they can apply their skills and strengths to the situation at hand.

How to apply this tool:

Remind them of strengths they've demonstrated in the past. Ask how they could apply them here. For example: "I hear that you're daunted by the tight timeline for this project. I also know that one of your strengths is designing under constraints. Earlier this year, you found a creative solution that allowed us to deliver the user impact without a major engineering rewrite. What would it look like to fully apply that strength in this situation?"

Go beyond cheerleading. Instead of lobbing over a "Great job!" after a team member nails a sales call, see if you can name the deeper strength they demonstrated. For example: "Nice job on that call! I noticed that you built strong rapport with the client, made them feel heard, and diffused their concerns about the product. Creating genuine trust with the client is a strength that makes you highly effective."

Pro-tip to keep in mind: To identify your team members' strengths, ask them to take the [VIA character strengths survey](#) (or another strengths assessment) and share their top five strengths.



themselves or someone on their team back. To spot when someone is stuck in a limiting belief, notice that they might say things like “I can’t” or “I’ll never be able to” or other phrasing that feels negative and fixed.

If you took the fix-it approach, you might default to saying: “That’s not true,” or “Don’t think that way about yourself.”

Here’s why you should use coaching instead: Limiting beliefs are often deeply ingrained. Simply denying them doesn't help the other person change. Instead, you can coach them to make their unconscious assumption conscious and shift to a more productive belief.

How to apply this tool:

Start by naming:

Step 1: When you notice that a direct report has a limiting belief, ask them: “What’s the underlying assumption behind that?” Help them name it and write it down. For example: “I’m too timid to be a leader.”

Step 2: Help them separate observations from interpretations. Observations are things we see or how we feel in our body. Interpretations are the meaning that we layer on top of these observations. We can separate them and notice how our interpretations don't necessarily follow what we're observing in the real world. For example: Your direct report says that they get nervous when they have to speak up in meetings and when they finally do, they speak softly and use a lot of filler words. This causes their team members to not take their ideas seriously. They interpret this to mean that they won’t be a great leader.



Step 3: Brainstorm alternative narratives that are more positive and helpful. One way to do this is to shift from negative language to positive language. For example: Your direct report reframes the original narrative from “I’m too timid to be a leader” to “I want to practice my public speaking skills, so I feel I more prepared and comfortable speaking up in meetings.”

Step 4: Finally, you can help your direct report test these alternatives — for example, helping them find a speaking coach and giving them an opportunity to present at the next Business Review meeting.

COACHING IN PRACTICE:

Referring back to our earlier example of the pitfalls of fixing — what might happen if the manager (Rachel) used a coaching approach instead?

Coaching in practice

Ana

To be honest, I haven't been feeling motivated at work. I tend to be bogged down in execution details, and I'm not getting enough exposure to strategy. I look around, and my peers are working on strategic projects that move their careers forward.

Rachel

Gotcha, thanks for sharing that with me. I want to support you in this, are you open to me asking a few questions to learn more?

Ana



I'm curious: In this situation, what would you like?

Ana

I want to take on a strategic project, one that allows me to really stretch and grow my strategy skills.

Rachel

I see. So you want to take on a strategic project that allows you to stretch and grow your strategy skills. And what will having that do for you?

Ana

It'll allow me to improve my ability to drive strategic decisions, especially ones that directly impact our revenue goals.

Rachel

Gotcha, and growing in your ability to drive strategic decisions that impact revenue goals— what will having that do for you?

Ana

It'll allow me to explore whether being a COO is the right path for me in the long run. I've been thinking about making a future switch from product management to a hybrid role that's more operationally focused because I love learning about the business.

Rachel

Wow, I'm excited for you to explore that career path, and I want to support you in that. Let's brainstorm: What options do you have for starting to explore COO as a longer term career path?

Ana

That's where I need some help. I guess I could reach out and talk to our COO to hear how she got to that position.



In this alternate scenario, instead of assuming that their direct report is after a promotion, the manager digs deeper. She uncovers that her team member is interested in exploring a career pivot — an insight that she wouldn't have known without asking open and honest questions. Armed with knowledge about what her direct report is solving for, the manager can be a much more effective ally and advocate.

When *not* to use coaching:

But a manager who only coaches won't be very effective. Other skills, such as



Coaching skills are tools — not the whole toolbox.

Imagine that a direct report wants to understand the organization's strategy and KPIs so they know how their work contributes to the bigger picture. In this situation (unless the report is a senior contributor to the strategy), it would be frustrating for the manager to start with coaching and turn the question back on their team member. The team member might think: "You're asking *me* what the strategy is?" and wonder if the company's leadership lacks direction.

It'd be helpful for the manager to first provide clarity about the strategy and metrics that matter, *then* follow up with open ended questions to get feedback from their direct report: "How are you thinking about your team's goals in relation to the strategy?" Or "From your vantage point, what might be the biggest blind spots in our stated strategy?"

Additionally, coaching is not the right approach when you:

Are dealing with an urgent, high stakes problem: If getting something right is crucial and urgent, and the responsibility is a stretch for your team member, coaching isn't appropriate. You'll need to jump in and provide swift direction. Your team members can still learn by shadowing your instruction and observing how you handle the urgent situation.

Need to give feedback: Coaching isn't a replacement for clear, actionable feedback, but it can amplify the effectiveness of your feedback. If you've noticed an opportunity for your team member to improve, share the feedback directly. Then add an open and honest question to deepen their understanding of the feedback or brainstorm next



Are training a less experienced team member: Coaching is most effective when your team member already has foundational competence in a task. If your team member does not have the basic skills for their role — maybe they're new or taking on a project outside their realm of experience — start with instruction and mentorship. For example, if your team member is presenting to the executive team for the very first time, it's appropriate to share advice about how to frame their points and structure their slides. You can drop in open questions to help them reflect on their learning: "How are you taking in this new skill? What has resonated for you? What's been challenging, and where do you want to dig in deeper?" Once they grasp the basics, you can spend more time coaching to help them grow.

Are managing someone who's struggling to perform: A direct report who isn't meeting baseline expectations for their role needs clear expectations about what it takes to get to good performance standing. Empathy is important, but asking too many open-ended questions won't set them up for success. Use a more directive approach in these situations.

When not to use coaching



Navigating a high stakes problem

If getting something right is crucial and urgent, and the responsibility is a stretch for your team member, coaching isn't appropriate.



Having a feedback conversation

Coaching isn't a replacement for clear, actionable feedback, but it can amplify the effectiveness of your feedback.



Coaching is most effective when your team member already has foundational competence in a task.

A direct report who isn't meeting baseline expectations needs clear expectations to reach a good performance standing.

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Getting started with coaching:

It can feel daunting to master all of these new coaching skills overnight. As you look to incorporate new techniques into your day-to-day approach, keep these tips in mind:

Start small

Start small and think about one step you can take to incorporate coaching into your management approach. It can be as simple as asking a few open and honest questions during your 1:1s this week. Then, in the next two weeks, start introducing the outcome shift and other tools we covered above.

Express your intention

It can be jarring for your team members if you drastically change your management approach. Set context for this shift. Let them know you'll be trying a different approach by introducing more coaching practices into your work together.

Get feedback and adapt your approach

Create a timeline with specific check-ins where you explicitly talk about what's working well and what they'd like to see more of. Set up time on your calendars to have this feedback conversation so you can both learn from it and adapt accordingly.



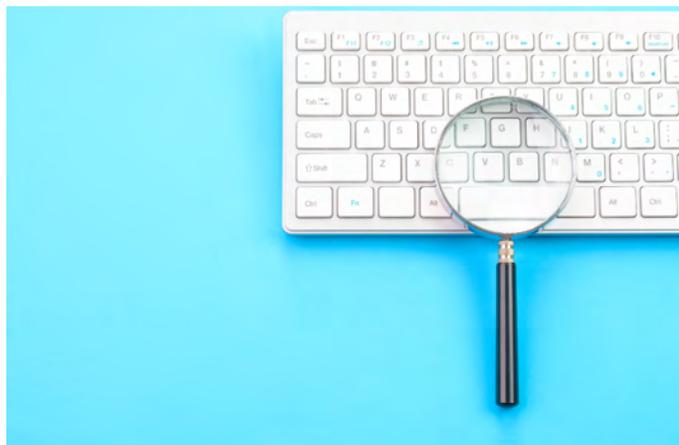
You're not always going to get it right. Often, you'll ask a question that doesn't land, or run through an options exploration session that doesn't actually get to a viable solution. That's okay. Be patient and keep trying. Good management is a practice, one that we should hone every single day.

In our experience working with hundreds of managers, we've found that the ones who are intentional about getting incrementally better each day are the ones who make the biggest impact on their teams.

Management isn't about having the expertise or know-how off the bat, but rather, understanding the needs of your team and adapting your style to best support them.

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