University of Houston Law Center
Spring 2027
Client Counseling & Interviewing

Room [TBA – per Spring 2027 Class Schedule]
Section # 12257
Course # 6218

Client Counseling & Interviewing

Wednesdays 5:30 pm to 7:30 pm

First class: Wednesday, January 20, 2027 | Last class: Wednesday, April 28, 2027

Credit Hours: 2 | Instructional Mode: Face-to-Face

Professors:	Megan Daic Amy Dunn Autumn Brehon Mark Kritzer
Required Texts:	ABA Model Rules of Professional Conduct (latest edition). Additional handouts and materials provided in class.
Recommended Texts:	Binder, David A., Paul Bergman, Susan C. Price, & Paul R. Tremblay, Lawyers as Counselors: A Client-Centered Approach (2nd ed., 2004). Herman, G. Nicholas & Jean M. Cary, A Practical Approach to Client Interviewing, Counseling, and Decision-Making (2009). Krieger, Stefan & Richard Neumann Jr., Essential Lawyering Skills (4th ed., 2011). Shaffer, Thomas L. & James R. Elkins, Legal Interviewing and Counseling in a Nutshell (2005).
Office Hours:	On request. Additionally, weekly Zoom hours will vary based on Adjunct Professor availability.

Phone and Email:

Megan Daic	**megan@daiclaw.com; (281) 701-6334**
Amy Dunn	**amy@amydunn.com (713) 333-1030**
Autumn Brehon	**abrehon@jw.com; abrehon@outlook.com (346) 730-2103**
Mark Kritzer	**mark@treyyateslaw.com (281) 702-0101**

Communication: All course announcements, materials, and assignment instructions will be posted on Canvas. Every student is expected to have access to Canvas and to a regularly monitored email account. Email is the best way to contact your professors, using the contact information above. We will generally respond within two business days.

Course Description

This course emphasizes a client-centered, practice-ready, and NextGen-aligned approach to interviewing and counseling. Students will explore:

1. The initial client interview and effective client management.
2. Ethics and professional responsibility, including conflicts and confidentiality.
3. Case analysis, development, and strategy incorporating client goals and stakeholder needs.
4. Communication strategies such as looping, summarization, cross-selling, and involving stakeholders.
5. Memo-writing for different audiences (client, partner, file).
6. Documentation and "CYA" practices: note-taking, file management, and client instructions.
7. Client preparation for negotiations, depositions, mediation, and trial.
8. Terminating the attorney-client relationship.

Learning Objectives

By the end of the course, students will be able to:

- Conduct effective client interviews using active listening, empathy, and structured fact gathering.

- Identify legal and non-legal issues, potential conflicts, and strategies consistent with client goals.
- Apply the ABA Model Rules of Professional Conduct in practice.
- Prepare effective memos tailored to clients (summarizing advice/next steps), partners (post-intake strategy), and file records (objective documentation).
- Document effectively: what belongs in notes, what does not, and when to upload/store securely.
- Manage client expectations, difficult personalities, and stakeholder involvement.

Assignments & Grading

• 10% Class Participation

• 10% Skill Evaluation

• 15% Preparation Memos (rotating audiences: client, partner, file)

• 20% Skills Exercise #1

• 20% Skills Exercise #2

• 25% Skills Exercise #3

Assessment Overview. All graded work in this course is skills-based and completed during the semester. Each Skills Exercise is a live, simulated client interview and/or counseling session evaluated against a rubric distributed in advance on Canvas. Preparation Memos are written for the audience specified in the assignment (client, supervising partner, or file). Class Participation reflects preparation, attendance, and meaningful engagement in in-class exercises and debriefs. The Skill Evaluation reflects demonstrated growth across the semester's in-class exercises.

Final Examination. This course does not have a final examination. Skills Exercise #3 (Interview & Counseling) serves as the culminating assessment and is conducted during a regularly scheduled class session. The Law Center will publish the official final exam schedule shortly after the Official Reporting Day (ORD); should any assessment in this course ever be scheduled during the final exam period, its date, time, and length will be governed by that published schedule.

Late Work. Memos are due at the time stated on Canvas. Late submissions will be reduced by one-third of a letter grade per day absent an excused reason

communicated before the deadline. A missed Skills Exercise may be rescheduled only for documented good cause.

Grading Standards. Final grades will be assigned in accordance with the Law Center's grading policies and any applicable grade-distribution requirements for skills courses, as set out in the Student Handbook.

Key Spring 2027 Dates

Monday, January 18 – Martin Luther King Jr. Day (Law Center closed)

Tuesday, January 19 – First day of Spring 2027 classes (our first class meets Wednesday, January 20)

Tuesday, January 26 – Last day to add a course

Wednesday, February 3 – Official Reporting Day (ORD): last day to drop without a grade and receive a full refund

Friday, February 19 – S/U election submission deadline

March 15–21 – Spring Holiday (no class Wednesday, March 17)

Wednesday, April 21 – Last day to drop a course or withdraw with a "W" (by 3 p.m.)

Wednesday, April 28 – Our last class meeting

Friday, April 30 – Last day of Spring 2027 classes

Monday, May 3 – Reading/Make-up Day for UH-cancelled classes (no regular class sessions)

May 4–12 – Final exam period (no final exam in this course)

Make-Up Classes. Class 14 (April 28) is reserved as a make-up and additional-practice session. If a class is cancelled by the instructor, it will be made up on a date coordinated with the Law Center's Spring 2027 scheduled make-up days and announced on Canvas. If a class is cancelled by the University (e.g., weather closure), it will be made up on the University-designated Reading/Make-up Day (Monday, May 3, 2027) or as otherwise directed by the Law Center.

Tentative Schedule (Spring 2027)

Class 1 (01/20): Introduction; Initial Client Interview; Client Management

- **Lesson:** Introductions + Client Interview Framework + Managing Expectations
- **Exercise:** Alex Rivers Exercise
- **Testing Skill/Quiz:**

Class 2 (01/27): Conflicts & Conflict Checks; Engagement & Non-Representation Letters; Stakeholder Looping; Fees; Handout Exercise #1

Class 3 (02/03): **Skills Exercise #1 – Client Interview (20%); Memo #1 Due**

- *Initial Interview – 45 mins*
- *Memo – 45 mins*

Class 4 (02/10): Ethics & Professional Responsibility; ABA Model Rules Focus

Class 5 (02/17): Elements of Causes of Action; NextGen Issue Spotting

Class 6 (02/24): Types of Clients; Managing Emotions & Expectations

Class 7 (03/03): Case Strategy; Cross-Selling & Stakeholder Involvement; Handout Exercise #2

Class 8 (03/10): **Skills Exercise #2 – Counseling (20%); Memo #2 Due**

- *Client Counseling + De-Brief*
- *Turn in Research Memo (due by following class)*
    - *Needs to show ability to quote the Rules*

03/17: Spring Holiday, March 15–21 (No Class)

Class 9 (03/24): Difficult/Problem Clients; De-escalation & Boundaries

Class 10 (03/31): Preparing Clients for Depositions, Mediation, or Trial; Discuss Fees

Class 11 (04/07): Documentation & CYA: Note-Taking, File Management, Client Instructions; Handout Exercise #3

Class 12 (04/14): **Skills Exercise #3 – Interview & Counseling (25%); Memo #3 Due**

Class 13 (04/21): Terminating the Attorney-Client Relationship; Wrap-Up

Note: April 21 is also the last day to drop or withdraw with a "W."

- *Guest Lecture: Practical and Ethical Considerations for Terminating an Attorney-Client Relationship*

Class 14 (04/28): Make-Up or Additional Practice Interviews

Designated make-up session; final course debrief. Any University-cancelled class will be made up on the Reading/Make-up Day (May 3) or as directed by the Law Center.

SPECIAL NOTE:

AI Generated Text

The software technology known as artificial intelligence has recently expanded its capability to generate text (AI Generated Text). Examples of the technology include what are known as "generative" large language models (LLMs), and specific implementations that are well known in the general public as ChatGPT or the like. These systems can generate text in response to prompts and/or input of other text/documents/code/images. The output – the AI Generated Text – appears to have human-mimicking "intelligence" and is thus potentially usable as a substitute for written work product a student might generate themselves. AI Generated Text can include computer code

or programs as well as human language content.

Your continuing enrollment in this course is deemed to be a pledge by you under the Honor Code to not prompt, generate, obtain, read, or use any AI Generated Text in relation to any activity or assessment in this course except as expressly allowed by the professors. This applies to AI Generated Text from yourself or others. This pledge includes that your assessment work product in the course is without any contribution from AI Generated Text unless expressly authorized by the professors. This specifically extends to the plagiarism policy and unauthorized aid/materials parts of the Honor Code: AI Generated Text will be treated as from another/other in applying the plagiarism policy to this course. The term "assessment" means any work product generated for this course that is submitted to the instructors or presented in a class session, regardless of whether it is graded content or not. Nor may AI Generated Text be used in the development or drafting of any assessments created by you in a non-proctored environment, such as "take-home" assignments, without prior express permission from the professors.

Instances when you are allowed or not allowed to incorporate AI Generated Text in your assignment(s) will be expressly stated by your professors. If listed in the syllabus, these designations are listed as "AI use NOT ALLOWED" or as "AI use ALLOWED, but you must indicate on the submitted assignment if you used AI and also turn in your prompts." For any assignment in which you use AI Generated Text, you must turn in the prompts you used to generate the material, in addition to turning in the final product. Note that for any assignment where AI use is allowed, you are not required to use AI if you choose not to.

Electronic caselaw research aids, such as Westlaw or LexisNexis, and online or hardcopy form books, such as those promulgated by O'Connor's, are not considered large language models (LLMs) or AI Generated Text. You may use these types of aids freely throughout the semester. If you are unsure whether a research aid, website, or other resource falls under the "AI Generated Text" restriction, please ask.

Prohibition. Subject to the exceptions immediately below, your continuing enrollment in this course constitutes your pledge not to generate or to use any AI-Generated Text—whether from yourself or others—in relation to any assessment in this course. The term "assessment" means any graded or ungraded work product for this course that is submitted to the instructor, presented in a class session, or used in an oral or written graded assessment for this course.

Exceptions.

The following AI-Generated Text uses are exceptions to the preceding prohibition. The

exceptions' intent is to allow the generation and use of AI-Generated Text for specific, narrowly defined activities related to this course.

- You may generate and use AI-Generated Text for class preparation, although you must disclose the full extent of that use if your professor asks. You may generate and use AI- Generated Text for study supplements to aid with general understanding of course content. This could take different forms that include creating examples or explanations of a concept, generation of diagrams and flow charts, "gamification" of course content, flash cards for study, or sample questions and answers.
- You may generate and use AI-Generated Text for an outline that summarizes the course content.
- You may use AI-Generated Text to check your originally drafted text for misspellings, grammar and punctuation errors, strength and clarity of prose, verbosity, effective transitional language and thesis sentences, word choice, excessive passive voice, and like things.
- You may use AI-Generated Text for the purpose of language translation

Use of an idea: If you use the idea (or an organization) of another author, you must attribute that idea to the other author. Merely paraphrasing the other author's words is not sufficient. You must also cite to the other source.

Use of the same words: If you use the idea and the words of another author, you must put

quotation marks around those words and cite to the source. Both are required. If either the quotation marks or the citation is missing, you have plagiarized the other author's work.

Intent is not required for a writing to be plagiarized. Using the ideas or words of another student may also be plagiarism. Regardless of what rules you may have followed on this subject before law school, or what practices you may observe elsewhere, this is the standard that you must adhere to in all of your Lawyering Skills classes, in all seminar papers, in all Moot Court briefs, and in all Law

Review or Computer Journal papers. This definition may be supplemented for Lawyering skills classes.

Instructional Mode (IM):

This course is designated as a face-to-face course, which means classes are in person by default, but designated classes may occasionally be held as remote classes via Zoom to accommodate other scheduling needs or other unforeseen circumstances. Students will be notified in advance of any classes that will be held remotely and a Zoom link will be posted on Canvas at the start of the semester that is the Zoom link that will be used for any such classes.

Required information from UH administration:

- Remote presence: The UHLC administration has notified faculty that the availability of "remote presence" (i.e., starting a Zoom meeting from the podium computer to enable student remote access during in-person class on an occasional basis) for the semester is not known; therefore, students should not rely on an expectation that remote presence will be available. (As noted below, per the UH recording policy, all classes will be recorded and recordings posted to the class Canvas page where they will remain up for the entire semester, so if a student is absent and unable to attend an occasional class in person, they may review the recording afterwards).

- Syllabus Changes: Please note that the instructor may need to make modifications to the course syllabus and may do so at any time. Modifications to the course syllabus may also be needed due to other unforeseen circumstances (such as a global pandemic, or weather-related emergency, or instructor illness). Such modifications may include changes to the mode of instruction or assigned material for the course. Notice of such changes will be announced as quickly as possible through the course website and/or email.

Law Center Attendance Policy: As noted in the student handbook, link (page 5), and required by ABA standards, the Law Center has a minimum 80% attendance policy for students. Therefore, 3 missed class sessions constitute nonadherence to this policy. Please communicate with your Professors in the event you have any issues complying with the UHLC Attendance Policy regarding this course. A student's nonadherence with the attendance policy may result in notification with the Office of Student Affairs.

Counseling and Psychological Services (CAPS)

Counseling and Psychological Services ("CAPS") can help students who are having difficulties managing stress, adjusting to the demands of a professional program, or feeling sad and hopeless. You can reach CAPS by calling 713-743-5454 during and after business hours for routine appointments or if you or someone you know is in crisis. No appointment is necessary for the "Let's Talk" program, a drop-in consultation service at convenient locations and hours around campus.

The Texas Lawyers' Assistance Program ("TLAP") also supports law students who are dealing with stress, anxiety, depression, substance abuse, and other mental health problems. You can reach TLAP at any time at 1-800-343-8527. TLAP's website includes a page with links to sources about mental health that are of interest to law students: https://www.tlaphelps.org/law-students.

Other Support Services: Law school can be a challenging experience. In addition to the resources above, there are other resources on campus to help. If you find yourself food insecure, housing insecure, or in need of mental health or other services, the University has other free resources for students available here: https://www.uh.edu/dsaes/coogscare/. The Cougar Cupboard provides free groceries for all students, with no requirements. More information is available on their website: https://uh.edu/dsa/cougarcupboard/.

Anti-Discrimination and Sexual Misconduct Policies

UHLC and the University of Houston are committed to maintaining and strengthening an educational, working, and living environment where students, faculty, staff, and visitors are free from discrimination and sexual misconduct. If you have experienced an incident of discrimination or sexual misconduct, a confidential reporting process is available to you. For more information, please refer to the University System's Anti-Discrimination Policy SAM 01.D.07 and Sexual Misconduct Policy SAM 01.D.08.

Please be aware that under the sexual misconduct policy, SAM 01.D.08, faculty and other University employees are required to report to the University any information received regarding sexual misconduct as defined in the policy. Due to this reporting requirement, faculty members and other employees are not a confidential resource. The reporting obligations under the sexual misconduct policy extends to alleged conduct by university employees and students.

Security Escorts and Cougar Ride UHPD continually works with the University community to make the campus a safe place to learn, work, and live. The security escort service is designed for community members who have safety concerns and would like to have a Security Officer walk with them, for their safety, as they make their way across campus. Based on availability either a UHPD Security Officer or Police Officer will escort students, faculty, and staff to locations beginning and ending on campus. If you feel that you need a Security Officer to walk with you for your safety, please call 713-743-3333. Arrangements may be made for special needs.

Parking and Transportation Services also offers a late-night, on-demand shuttle service called "Cougar Ride" that provides rides to and from all on-campus shuttle stops, as well as the MD Anderson Library, Cougar Village/Moody Towers and the UH Technology Bridge. Rides can be requested through the UH Go app. Days and hours of operation can be found at https://uh.edu/af- university-services/parking/cougar-ride/.

A. Other UH Resources:

- Diversity and Inclusion Statement
- Non-Discrimination Statement
- Justin Dart, Jr. Student Accessibility Center
- Cougars in Recovery
- Counseling and Psychological Services

- Veterans Services
- Cougar Cupboard
- CoogsCare (student assistance resources)
- DACA: What You Need to Know
- Student Health Center
- Wellness

Names and Pronouns

I want to address each of you in a manner that corresponds to your identity. Although mistakes happen, chosen names and preferred pronouns—including non-binary ones such as they|them|their—and honorifics, such as Rev., Mr. Ms. Mx. Dr., will be respected in my classroom. Please feel free to reach out to me at any time if you want to make me aware of your chosen name or preferred pronoun or if you have concerns about how I or your classmates address you.

My pronouns are _____. You may call me _____.

Reasonable Academic Adjustments/Auxiliary Aids

The University of Houston is committed to providing an academic environment and educational programs that are accessible for its students. Any student with a disability who is experiencing barriers to learning, assessment or participation is encouraged to contact the Justin Dart, Jr. Student Accessibility Center (Dart Center) to learn more about academic accommodations and support that may be available to them. Students seeking academic accommodations will need to register with the Dart Center as soon as possible to ensure timely implementation of approved accommodations. Please contact the Dart Center by visiting the website: https://uh.edu/accessibility/ calling (713) 743-5400, or emailing jdcenter@Central.UH.EDU.

Accessibility and Accommodations

UHLC is committed to ensuring that all students enjoy equal access and full participation.

If you anticipate or experience barriers based on a disability (including any chronic or temporary medical or mental health condition), please feel free to reach out to me so that we may discuss options. If you require any support services, you may contact Ms. Samantha Ary, Academic Records Coordinator. Ms. Ary is located in room 44A TU-II in the Office of Student Services suite, and she can be reached at sary@central.uh.edu or 713-743-7466. Requests for accommodation that involve graded assignments **must be directed to Ms. Ary** and should be made as soon as possible to allow adequate time to document and to process the request.

If you observe religious or cultural holidays that will coincide with synchronous class sessions or conferences, please let me know as soon as possible, so that we may make arrangements.

Honor Code

The UHLC Honor Code applies to all aspects of my class. *You are responsible for knowing all Honor Code provisions and for complying with the Honor Code*. Please ask me if you have any questions regarding how the Honor Code's provisions apply to specific activities or situations related to my course. *It is an Honor Code violation to review the graded assignments distributed to, or written by, any of my students from prior years.*

Recording of Class (if applicable)

Students may not record all or part of class, livestream all or part of class, or make/distribute screen captures, without advanced written consent of the instructor. If you have or think you may have a disability such that you need to record class-related activities, please contact the Justin Dart, Jr. Student Accessibility Center. If you have an accommodation to record class-related activities, those recordings may not be shared with any other student, whether in this course or not, or with any other person or on any other platform. Classes may be recorded by the instructor.

Students may use instructor's recordings for their own studying and notetaking. Instructor's recordings are not authorized to be shared with *anyone* without the prior written approval of the instructor. Failure to comply with requirements regarding recordings will result in a disciplinary referral to the Dean of Students Office and may result in disciplinary action.