

AGENDA

Paraprofessional Licensing Implementation Committee

Meeting Date: February 22, 2021
Meeting Time: 12:00pm – 2:00pm
Location: Zoom Call

Join Zoom Meeting

<https://us02web.zoom.us/j/84752571457?pwd=Y25kczV4OUdKa3FwS0FVVmFpNjFzdz09>

Meeting ID: 847 5257 1457

Passcode: 694507

1. Introduction and Welcome (12:00pm – 12:10pm)

- For today's meeting, we have guest speakers who will be joining the full committee from 12:15pm – 1:00pm to discuss existing admissions & continuing education requirements for lawyers and options for paralegals.
- Workgroup breakout sessions will take place from 1:00pm – 1:45pm after which we will come back for a 15 minute debrief and a discussion of next steps

2. Approval of past minutes (12:10pm – 12:15pm)

- [2/8 Implementation Committee Meeting Notes](#)
- 2/8 Admissions Workgroup Notes
- [2/8 Regulation Workgroup Notes](#)
- [2/15 Admissions Workgroup Notes](#)

3. Guest Speakers (12:15pm – 1:00pm)

- Troy Wood, Regulatory Counsel. Provide overview of existing admissions requirements, process for making character and fitness recommendations, and options for paralegals.
- Jade Priest-Maoz, MCLE Program Manager. Provide overview of pre- and post-admission continuing education requirements for lawyers and options for paralegals.

4. Discussion Points for the Full Committee. Are there additions to this list? Does the full committee want to discuss this before we head into break out rooms? What is helpful to decide now versus later?

- **Scope of License.** What should the scope of license be?
- **Mandatory Reporting of Child/Elder Abuse.** Should LPs be mandatory reporters? The LPs may be exposed to a number of instances in family law and landlord tenant matters where they may see or have knowledge of instances of child or elder abuse. If the Committee decides yes to include a recommendation for inclusion as

mandatory reporters, then the Admissions Workgroup and Regulatory Workgroup would include educational requirements on Mandatory Reporting both pre- and post- admission.

- **IOLTA Accounts.** Will the LPs be required (or allowed) to have IOLTA accounts and who is tasked with making that decision? If the LPs will only be permitted to offer flat fee or bill the client for their services, then this is a moot point, however if they will be administering trust accounts, then the Admissions Workgroup would require training on the administration of trust accounts as part of the ethics training requirements and the Regulatory Workgroup may consider MCLE requirement on this topic as well. May also consider mandatory audit of trust accounts.
- **Possible recommendation regarding access to free or low cost CLEs.** Options to consider include: Make the same CLEs available free to the attorneys or student learners available to the LPs; Bar materials; Preferred rates such as those offered to attorneys with less practice experience; Offer CLEs in the practice area specific topics; and Good faith efforts of those applicants who need to complete CLEs within 12 month window in advance of their application

5. Discussion Points Resolved

- **LP membership with the Bar.** Will LPs will be admitted to the Bar as Associate Members or other as yet determined membership category? This topic was discussed previously and was tabled, noting that the term Associate Member was already defined and will be addressed in the administration of the program.

6. Workgroup Breakout Sessions: (1:00pm – 1:45pm)

- Admissions and Education
- Regulation
- Stakeholder Outreach

7. Breakout Room Full Committee Debrief (1:45pm – 2:00pm)

8. Resources

- Review website - <https://paraprofessional.osbar.org/>

9. Future Meeting Schedule

- March 8, 2021 – 12:00pm – 2:00pm – Full Implementation Committee Meeting
- March 22, 2021 – 12:00pm – 2:00pm – Full Implementation Committee Meeting
- April 5, 2021 – 12:00pm – 2:00pm – Full Implementation Committee Meeting
- April 19, 2021 – 12:00pm – 2:00pm – Full Implementation Committee Meeting

10. Other Business/Next Steps