# PARALEGALS PLUGIN

2020 NFPA ANNUAL CONVENTION

OCTOBER 22 - 25

HOSTED BY THE MINNESOTA PARALEGAL ASSOCIATION

REGISTRATION BEFORE SEPTEMBER 18 WILL BE DISCOUNTED
SEE PAGE 27 FOR FULL DETAILS

NETWORKING (WED., OCT. 21)................................................................. $0

CONTINUING EDUCATION SEMINARS & WORKSHOPS [THURS., OCT. 22]

MEMBER ALL DAY.................................................................................. $150

NON-MEMBER ALL DAY ....................................................................... $270

STUDENT ALL DAY ............................................................................. $150

KEYNOTE ONLY (MEMBERS)................................................................. $25

KEYNOTE ONLY (NON-MEMBERS)....................................................... $50

BOARD MEETING ................................................................................ $0

REGION MEETINGS (FRI., OCT. 23).................................................... $0

POLICY MEETING [SAT., OCT. 24 & SUN., OCT. 25]

LOCAL ASSOCIATION CREDENTIALED OFFICER (FIRST)............. $175

LOCAL ASSOCIATION CREDENTIALED OFFICER (ADDT’L)............. $125

POLICY MEETING OBSERVER (MEMBER).......................................... $85

POLICY MEETING OBSERVER (STUDENT)......................................... $35

HTTP://WWW.PARALEGALS.ORG/CONVENTION
President’s Message

It has been an honor to serve as your President the past two years and to be a part of the changes and transformation of NFPA. While at times, it has been challenging we have faced these obstacles head-on. I am encouraged by the steps we’ve taken and invigorated to face those new obstacles with as much zeal and enthusiasm as we have responded in this past year.

For example, we hired a new management company, with the assistance of Bloch&Reed. Because of the strategic methods employed to identify a management partner that would meet NFPA’s unique needs, we were able to identify and partner with Management Headquarters. Management Headquarters has proven they are not afraid of the challenges that lie ahead as NFPA looks to strengthen our place in the paralegal world. They have worked with us to streamline many of our processes and are assisting the board in being more strategic-focused and not getting into the weeds or bogged down.

A Sincere thank you to Dara Rudick and the entire MHQ Team and Michael Reed and Jaime Nolan of Bloch&Reed for their support, training, and guidance this year. I also want to thank my fellow board members and all of their committee members for your hard work, dedication and support over the last two years. We could not have accomplished all of the things we have without your dedication and support.

This year due to the COVID-19 pandemic we are holding our first ever 100% virtual convention and policy meeting, virtually hosted by the Minneapolis Paralegal Association. While we cannot be in Minneapolis in person, MPA, the Convention Committee and MHQ have worked hard to plan this virtual convention follow as close to a normal schedule as possible.

We are excited to utilize technology, try something new and still gather together! I’d like to thank Mianne Besser, Secretary and Director of Operations, Mackenzie Kelley, MPA’s Convention Coordinators Maren Schroeder and Amy Conrad for their hard work in planning the convention. You all have done a fantastic job regrouping and planning the virtual convention. Don’t worry, you will get to visit Minneapolis and the Mall of America! MPA has also graciously agreed to host the 2021 Joint Conference. Keep an eye on the NFPA website and NYCU for updates.

This year has been all about change - changes to our processes, changes to our governance structure, updating our Strategic Plan and holding our first ever 100% virtual convention. I know that NFPA’s Member Associations and delegates have risen to the challenge and volunteered your time and talent to work with NFPA, Bloch&Reed and MHQ to move NFPA forward.

Many of you were recruited to assist the Futures Task Force to review and update the governing documents, some assisted the strategic plan committee and others helped change the culture of NFPA. You all attended the Town Hall Meetings and gave up countless hours of your time to help get the work done in order to ensure that NFPA remains a member-driven Federation, while strengthening NFPA and ensuring its future as the leading voice of the paralegal profession.

This is not the first time that NFPA has been challenged, but we are resilient and will continue to roll with the punches in order to ensure that NFPA remains relevant and the Leader of the Paralegal Profession! I look forward to continuing this journey with you and moving NFPA forward.

NITA SERRANO, RP®, AACP, FRP
PRESIDENT
While it may seem like our physical connectedness is temporarily void, we are now staying more socially connected when you share your personal stories, professional insights and accomplishments in the National Paralegal Reporter. We learn from one another and ultimately help us do better, stay current and uplift each other. This is the long-lasting impact this pandemic has brought. We will get through this together. Stay safe and healthy. Take care. Live Aloha.

This is one of the most beautiful times of the year – every leaf speaks bliss to the landscape across the country as we enjoy the crisp air and cozy atmosphere. All the while we anxiously wait for festive occasions that bring us comfort. The legal industry has seen a number of impacts from the pandemic and NFPA's Editorial Team is committed to appeal to our members by providing current and relevant content. More than ever, we are reaching out to you to share your story, accomplishments or knowledge. Personalized content is engaging – it appeals tenacity, talent and passion that paralegals have in the delivery of legal services and commitment to the profession.

Personally, I have been amazed by the incredible amount of time and outreach from readers who contribute to this quarterly magazine. This issue, celebrates nostalgic milestones, features NFPA updates and shares information helpful to your professional development. Magazines tell stories and shed light on experiences...we want to hear from you.

While it may seem like our physical connectedness is temporarily void, we are now staying more socially connected when you share your personal stories, professional insights and accomplishments in the National Paralegal Reporter. We learn from one another and ultimately help us do better, stay current and uplift each other. This is the long-lasting impact this pandemic has brought. We will get through this together. Stay safe and healthy. Take care. Live Aloha.
National Center for Access to Justice Needs NFPA Members

Early this year, NFPA’s Vice President & Director of Position and Issues, Lori Boris, RP, MnCP was invited to visit Fordham University in New York City to participate in a consortium of legal professionals put on by the National Center for Access to Justice (NCAJ). This group was to bring together a discussion on how to go about helping lower-income Americans to get the legal help they need. The conversation was to include lawyers, legal educators, and paraprofessionals of various types. Unfortunately, like most things this year, it was cancelled due to the pandemic.

This consortium is now going virtual and needs NFPA member input. Chris Albin-Lackey, Legal and Policy Director, NCAJ, has reached out to the NFPA, again. Chris is looking to bring together a group of NFPA members to share their perspectives (see his questions below provided by Chris). The National Center for Access to Justice will be compiling a report that will gather thoughtful, practical perspectives from non-attorneys in key professions—paralegals, social workers, librarians, activists, and others—on how non-lawyers can help bridge the justice gap. More specifically, we will ask people to talk with us about whether there are particular kinds of legal work they would like to be able to engage in, with or without an attorney’s supervision.

The key questions we want to discuss are:

- What kinds of legal advice and other services should members of your profession be empowered to provide, and under what circumstances?
- Are there ways the existing rules block you from doing work that you are in fact competent to carry out?

We are hoping to discuss these questions, in an open-ended way, with paralegals who work in a range of different practice areas. If for any reason, participants feel more comfortable speaking candidly, NCAJ will anonymize interviews.

The National Center for Access to Justice is a non-profit organization that works to support the creation of a more equitable justice system. NCAJ believes the rules prohibiting non-lawyers from using the law to help others make it impossible for millions of Americans to get the legal help they need. NCAJ also believe that people other than lawyers can provide high-quality legal advice and services in many situations. Many states are vigorously debating reforms that could improve this situation—but these policy discussions have generally failed to include the perspectives of non-attorneys who are already working with the law, or with people in need of legal help. Learn more about NCAJ by visiting their website at https://ncforaj.org.

This is an opportunity to truly be the "Leader of the Paralegal Profession!!" Share your insight and be part of the discussion. For planning purposes, interested participants should contact Lori Boris, RP, MnCP at VPPI@paralegals.org for further information.
Drug prescriptions are filled for people who take these same medicines daily without even bat ting an eye, or truly knowing what they are taking. More importantly, most individuals are not even aware that their prescriptions are made up of many ingredients, not just one. Also, the average consumer has no clue that the drugs they are prescribed could be subject to unclean manufacturing, misbranding, misuse, and pharmaceutical corruption.

A long line of trust is involved ranging from patients trusting their doctors to prescribe safe drugs to the doctors trusting their sales representatives who make assertions of the drug’s efficacy. This line is further extended to the pharmaceutical industry trusting the FDA to giving the public verification of its approval of drugs that are being distributed. One large issue is the unfamiliarity of what an active pharmaceutical ingredient is, as well as the importance of each of these types of ingredients being safe and pure. Extending that further, is what happens when these ingredients have adverse impact on the user of the drugs they are in and who is ultimately liable if injuries and damages occur?

**HOW SAFE IS THE MEDICINE YOU ARE TAKING?**

An active pharmaceutical ingredient is defined as “… the term used to refer to the biologically active component of a drug product (e.g. tablet, capsule). (Science Daily)” These active ingredients are made using raw materials through chemical and physical means. (mdtvalliance). The API active ingredient) is the specific component responsible for the desired effect it has on the individual taking it. What many individuals and those in the chain of trust often are unaware of is the fact that the active pharmaceutical ingredients are not always safe or pure. Further, many of these active pharmaceutical ingredients, hereinafter referred to as API are manufactured in foreign countries.

**THE IMPACT OF OUTSOURCING TO MAKE YOUR PRESCRIPTIONS**

APIs are commonly referred to as ‘bulk pharmaceuticals’ are usually created in foreign countries and thereafter shipped to where they are manufactured. Today, the great majority of API manufacturers are located around Asia, specifically in India and China. This has led to more and more companies to outsource API manufacturing to such places, which has the main benefit of eliminating the need to invest in unbelievably expensive equipment and infrastructure (http://www.mdtvalliance.org/)

Countries such as India and China now supply over 40% of APIs used in the U.S. Also, the Food and Drug Administration, hereinafter referred to as the FDA has indicated that 80 percent of all active pharmaceutical ingredients used in medications consumed by U.S. patients are imported from other countries (Public Citizen). So, what does this mean for you and the drugs that you take?

**POTENTIAL LEGAL ISSUES WITH ACTIVE DRUG INGREDIENTS AND THE DRUGS YOU MAY BE TAKING**

There are several issues that can happen with many drugs’ active ingredients. One issue surrounds the foreign manufacturing of these ingredients. Another issue is repacking misconduct of the active ingredients by pharmaceutical packing companies. Yet another issue includes the failure to maintain traceability of the API throughout the supply chain. Finally, the possibility of drugs being counterfeit is high as well. There is often not enough oversight 

**UNITED STATES MONITORING OF FOREIGN DRUG INGREDIENTS**

It is often difficult to monitor the manufacturing of drugs or their biproducts when the process is taking place in a foreign country. Safety in the chain of drug flow from a foreign manufacturing plant to the United States is a top priority. The drugs must pass stringent quality control standards. Further, FDA inspectors must be allowed to access facilities that are manufacturing and shipping drugs to the United States. FDA inspectors have been denied access to the manufacturer’s quality control laboratories and procedures for testing and analyzing raw materials, intermediate products, and final drug products.

**THERE IS A SPIDER IN MY PRESCRIPTION**

One situation involved Nippon Fine Chemical’s drug manufacturing facility in Hyogo, Japan in December of 2015. When an FDA investigator visited, there was reason to be concerned about the quality control in this laboratory As it turns out, the FDA investigator had reason to be worried about the performance of Nippon’s quality control laboratory at its Hyogo facility. During the inspection, the investigator found records of complaints the company had received from its custom-
ers about finding “glass, hair, cardboard, metal, product discoloration, and a black spider” in Nippon’s drugs. The company refused to provide the agency with copies of these customer complaints, and a quality assurance manager prevented the FDA investigator from taking photographs of equipment used to manufacture drugs distributed in the U.S. (Public Citizen)

After nearly eight months of delay, in August of 2016, the FDA placed an import alert which allowed them to detain all the company’s drug products at the border. “The FDA declared Nippon’s drug products to be “adulterated” because company employees limited the FDA’s inspection of the Hyogo facility, including by refusing to permit the FDA investigator to enter the quality control laboratory (Public Citizen).”

RE-PACKERS MISCONDUCT OF ARTIFICIAL INGREDIENTS PUT CONSUMERS AT RISK

It is important to be able to identify any drug’s original manufacturer to make sure that the drugs meet high quality standards that patients deserve. An issue of concern is where improper repackaging or lack of supply chain oversight of API causes serious compromising of drugs that are distributed to drug manufacturers, compounding pharmacies, outsourcing facilities or where there is a lack of supply chain oversight. Because of this issue, adverse events can occur once the fully manufactured drug reaches the patient.

An API re-packer failed to investigate complaints about a sub-potent API. The re-packer did not conduct any cleaning validation studies to show that their cleaning procedures for non-dedicated production equipment at B&B Pharmaceutical were adequate to prevent potential cross-contamination between re-packaged API and high potency drugs like testosterone, progesterone, estrogen and opioids. They also did not provide critical information about the quality of the API drugs or where they obtained them and their components. This in turn compromised the supply chain accountability and traceability putting patients/consumers at risk.

Other pharmaceutical companies where this same issue occurred include Enoyachem and Spectrum both of which failed to maintain traceability of the APIs used throughout the distribution chain. The Spectrum and Enovachem warning letters also state these companies list glycerin among the products they repackage. In 2007, the FDA issued final guidance intended to alert pharmaceutical manufacturers, pharmacy compounders, re-packers, and suppliers to the potential public health hazard of glycerin contaminated with diethylene glycol (DEG), a poison which may be deadly to patients. Lapses in supply chain oversight, including incomplete information on certificates of analysis, was one of the factors that allowed contaminated drugs to enter the supply chain in the past.

COUNTERFEIT DRUG PRESCRIPTIONS

Who would ever think that any medicine one is taking could possibly be the wrong one, or not have an active ingredient in it? Also, even if a specific medicine did have correct active ingredients, there is still a possibility that an incorrect dose should be given. Many do not take the necessary precautions to make sure the medicines they are prescribing or administering are authentic. Examining the outer box of medications for the necessary authentic ingredient(s), or “if the vial is missing the lot number, these could be signs of a counterfeit drug. For example, when the FDA was investigating a claim regarding Botox, they instructed Allergan to view the outer carton and vial display to make sure the active ingredient “Botulinum Toxin Type A” instead of OnabotulinumtoxinA “was on it. (Fda.gov/drugs)

HOW THIS IMPACTS THE CORONAVIRUS

Because we depend on active pharmaceutical ingredients from China, this is problematic to Americans. There is concern that we may be setting ourselves up for unsafe medicines especially if China tries to produce a lot of medicine in a short period of time right after they were shut down due to Covid-19. As a result, President Trump indicated that “The coronavirus brought home the core elements of our medical-supply chain are just as strategic to our national security” as “nuclear submarines and aircraft carriers are, and have to be treated with the same kind of approach, which is to say that we have core domestic manufacturing capabilities.”

As an additional perk to revamping the international pharmaceutical landscape, the CEO of the Serum Institute of India Ltd. Adar Poonawalla may be the most important figure in the global vaccine race who isn’t working in a laboratory:” The Indian vaccine entrepreneur plans to save the world from coronavirus — and then rad-
ically remake the international pharma landscape. Poonawalla also wants to pressure companies and governments to start changing the landscape, using the moral example of Covid-19 — and the global need for inexpensive vaccines on a massive scale — to illustrate the flaws in the current system, which he believes hamper the availability of life-saving protections in the developing world and access to low-cost drugs in wealthier countries (politico).

THE PARALEGAL’S ROLE IN LAWSUITS INVOLVING DRUG MANUFACTURING

When it comes to negligence and product liability lawsuits regarding drug manufacturing, the paralegal can play an important role in research as well as document preparation. Armed with the knowledge that pharmaceutical companies have a duty to deliver safe products/drugs and for warning about potential risks, today’s paralegal is extremely helpful in helping to research cases involving negligence and the remissive mistakes that the United State Food and Drug Administration has made. The paralegal’s role in assisting with the gathering information regarding the foreign manufacture of active drug ingredients as well as the ultimate delivery, usage and efficacy of drugs is key in helping establish liability in the chain of pharmaceutical manufacturing and distribution. The process often puts millions of Americans at risk of injury by both action and inaction of sometimes not putting drugs on an alert list.

The cases a paralegal can be involved in vary in terms of reasoning behind the lawsuits. The following lists some of the largest pharmaceutical lawsuits to date from largest to smallest and a brief reasoning behind the judgments:

1. GlaxoSmithKline – $3bn as “It failed to report certain safety data to the FDA and reported false drug prices to underpay rebates owed under the Medicaid Drug Rebate Program. Antidepressant drugs Paxil and Wellbutrin were misbranded, and healthcare providers were provided various rewards by the company to recommend them to the patients for off-label uses. The company also failed to produce safety data for Avandia, a diabetes drug that left concerns among patients over its cardiovascular safety (pharmaceutical technology).”

2. Takeda Pharmaceutical – $2.4bn “The company was found guilty of hiding the bladder cancer risks related to the drug. Also, Patients alleged that the company misled the public and asserted on the benefits of the drug overlooking its side effects based on clinical trials (pharmaceutical technology).”

3. Pfizer – $2.3bn as “Healthcare providers received payments for prescribing these drugs to patients for off-label use. Also, false claims were submitted to government healthcare programs, bypassing the insurance programs (pharmaceutical technology).”

4. Johnson & Johnson – $2.2bn for “Offering payments to healthcare providers for their unlawful marketing targeting elderly patients with dementia (pharmaceutical technology).”

5. Abbott Laboratories – $1.5bn for “Abbott targeting elderly dementia patients and dwarfed the associated risks related to drug usage that was found in clinical studies. The company trained its sales team under various programs to promote Depakote to healthcare providers and nursing home employees. It made agreements with pharmacy providers for the payment of rebates on the increased use of Depakote in nursing homes (pharmaceutical technology).”

6. Eli Lilly and Company – $1.4bn for “Eli Lilly misbranded the drug Zyprexa for the treatment of dementia or Alzheimer’s dementia, agitation, aggression, hostility, depression and generalized sleep disorder in elderly patients (pharmaceutical technology).” The company trained its sales force to unlawfully promote off-label uses and spent resources to promote the drug in nursing homes and to provide rewards for doctors for prescribing them to patients for the unapproved uses. False claims were submitted to federal insurance programs such as Medicaid, avoiding insurance coverage for off-label uses (pharmaceutical technology).”

7. Merck – $950m for “Misbranding Vioxx for rheumatoid arthritis in the interim three years before receiving the FDA’s approval for the indication in 2002. False and misleading claims regarding the cardiovascular safety of the drug to increase its sales was also shown (pharmaceutical technology).”

8. TAP Pharmaceutical – $875m for “Fraudulent drug pricing and marketing practices for its prostate cancer drug, Lupron and for charging for free samples of the drug (pharmaceutical technology).”

9. Bayer and Johnson & Johnson – $775m for “Misleading marketing and patients were not informed adequately regarding the risks related to Xarelto and the resulting life-threatening complications (pharmaceutical technology).”

10. Amgen – $762m for “Misbranding and improper use for treatment and illegal kickbacks and false prices for various drugs (pharmaceutical technology).”
traceability within intranational facilities. Finally, the previously mentioned lawsuits will hopefully encourage pharmaceutical companies to ethically promote, as well as provide truthful material facts about the drugs and side effects that they offer.

RAMONA ATKINS, JD is the author of several study guides, tests banks and courses on Business Law. She is a full time faculty at Purdue University Global School of Social and Behavioral Sciences.

REFERENCES:
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Ethics in the Time of COVID-19

By Yanna Llorente

**ETHICS | eTHiks |**
**NOUN**

1. **MORAL PRINCIPLES THAT GOVERN A PERSON’S BEHAVIOR OR THE CONDUCTING OF AN ACTIVITY.**
   - THE MORAL CORRECTNESS OF SPECIFIED CONDUCT.

2. **THE BRANCH OF KNOWLEDGE THAT DEALS WITH MORAL PRINCIPLES.**

It is often issues relating to adults which confront us with the ethical dilemma of certain actions. No doubt in the legal field and as paralegals, many of us have faced ethical concerns arising in our cases that question the proper course of action. There are many times when it is important to err on the side of caution and seek outside opinions, even calling the Bar Ethics Line with in-house counsel if ever necessary reassurance or a Bar ethics rule is needed for reference.

The concerns brought forth today, however, relate to the many minor children intertwined in the court process during family law litigation. Particularly in light of COVID-19, child custody issues and child support have become increasingly dynamic ethical conundrums.

**EXAMPLE**

Parent-1 seeks to terminate time-sharing during the pandemic because Parent-2 is employed in healthcare. Parent-1 feels the minor children are at risk based on Parent-2’s employment and as such requests Parent-2’s time-sharing to be terminated until the pandemic subsides.

**EXAMPLE:**

Parent-1 dealing with prolonged unemployment and requests to suspend child support obligation owed to Parent-2 based on the financial effect the pandemic has had on employment and income.

As we have all encountered during this pandemic, tensions are very high and naturally, people are quick to make judgments. There is a fine line when we are faced with clients who request to take aggressive legal action against the other parent for something that is litigious, often intending to harass the other parent, and which ultimately undermines the best interest of the children involved.

It is with this in mind that paralegals and counsel must make a point to remind clients of the most integral aspect of disputes between parents: the minor children involved. In any ethical dilemma in which minor children are on the receiving end, the moral principles which should govern the actions of the parents must be considered and great weight should be given to the conduct of our clients and the impact it will have on their children.

As far as the laws of Florida provide, Florida Statutes, §61.13, are clear in the protections of children when dealing with custodial disputes. A reading of §61.13 outlines many legal considerations to be taken into account when parenting of minor children is to be adjudicated and the statutes specifically state as follows:

“The court shall determine all matters relating to parenting and time-sharing of each minor child of the parties in accordance with the best interests of the child… It is the public policy of this state that each minor child has frequent and continuing contact with both parents after the parents separate or the marriage of the parties is dissolved and to encourage parents to share the rights and responsibilities, and joys, of childrearing. There is no presumption for or against the father or mother of the child or for or against any specific time-sharing schedule when creating or modifying the parenting plan of the child… The court shall order that the parental responsibility for a minor child be shared by both parents unless the court finds that shared parental responsibility would be detrimental to the child.” (Emphasis added)

I believe every parent does generally have the best interest of their children in mind, but it is common for clients to experience emotions, such as anger and contempt towards the adverse parent, which often leads clients to behave in rather vindictive ways. When we realize these patterns of behavior are present in the mindset of a client, it is appropriate to ease them into recollecting their thoughts with a more positive frame of mind, rather than the displacement of blame and finger-pointing that is prevalent in nearly every custody dispute.
During this [now practically coined] unprecedented time of COVID-19, we must provide good guidance and careful coaching to clients to promote the best interest of the children. Such guidance and coaching should prevail regardless of whether or not the best interest of the children overcomes the interest which the clients seek to obtain for themself. Parties to family law proceedings should be reminded that although their self-interest and trauma are well-understood during the process of custody and divorce, their minor children do see, hear, and feel incredible stress during tumultuous family breakdowns.

CONCLUSION

The disturbances of COVID-19 have suspended minor children in a limbo-reality, with the future so unclear the inconsistency of their day-to-day appears to them a perpetual abyss of uncertainty. The ways of COVID-19 life has thrust upon them school closures, face coverings, social distancing, and the recent extension of all these protocols into the 2020-2021 school year in many states. Accordingly, it is our obligation to uphold the ethical standards in our work, which as members of the legal profession we owe to the public, the court, our professional colleagues, our clients, and the far-too-many minor children involved in the legal system.

Examples are generic based on regular family law issues in the courts during COVID-19. Names used are strictly fictional.

See Generally, Chapter 61, §61.13, Florida Statutes.

YANNA LLORENTE is the Solutions Manager and Paralegal at Lasley Family Law in Tampa, FL. She devotes her skills exclusively to the areas of marital and family law. She is involved in the legal community and promotes the interest of minor children whenever possible. Although she does not have children of her own at the time of writing this article, she has taught the art of Ballet to children for many years which allowed her to see minor children develop on a day-to-day basis. The impacts of trauma, inclusive of family disputes and breakdowns, were always evident in the classroom (even in an art form that does not involve speaking).
Role of a California Legal Document Assistant

By Rhonda S. Harrigan

When Nolo Press published its first self-help legal book, *How to File Your Own Divorce in California*, in 1971, I don’t think anyone could imagine the huge change to the legal community that this would bring.

Two years later, a chain of divorce self-help centers opened to assist consumers who were using the book. These centers operated as legal secretaries, taking their directions from their customers who were acting as their own attorneys. These legal secretaries made it clear to their customers that they were not attorneys, would not provide legal advice, and would only provide secretarial services.

**DO-IT-YOURSELF DIVORCE**

As the do-it-yourself divorce idea became more widely accepted, the do-it-yourself divorce centers became very successful and spread over the Country. More services were added, such as bankruptcy, personal injury settlements, guardianships, name changes, and restraining orders against domestic abuse.

Paralegals jumped on the bandwagon and began calling themselves “Independent Paralegals” adding to the services they were providing. They started preparing their own brochures instead of using the Nolo book, advising consumers as to their legal options, and selecting the court forms needed for filing. This came to the attention of family law attorneys and many independent paralegals were charged with unauthorized practice of law (UPL) while others were forced to close their businesses.

The California legislature also took notice and decided to recognize and regulate this new profession.

**CALIFORNIA LEGAL DOCUMENT ASSISTANTS**

In 2000, California enacted new legislation that authorized non-lawyers to prepare legal documents for consumers performing their own legal work. California Legal Document Assistants are required to comply with Business and Professions Code §§ 6400-6415, which governs registration procedures and conduct of business.

They must complete the legally required education, maintain a $25,000 bond, and register with the county in which they work. California Legal Document Assistants are required to have a contract with each client which must state the scope of their duties, their status as a non-lawyer, and a disclaimer stating that they are prohibited from providing legal advice or opinion. Legal document assistants are regulated by the California Department of Consumer Affairs.

The Task Force on Access Through Innovation of Legal Services is charged with identifying possible regulatory changes to enhance the delivery of, and access to, legal services through the use of technology, including artificial intelligence and online legal service delivery models. Among the State Bar’s strategic objectives is to explore options to increase access to justice through licensing paraprofessionals.

According to results from the Justice Gap Study, uncertainty surrounding whether or not their problem was a legal issue, concerns about cost, fear of pursuing legal action, and not knowing where to go for help were top reasons why Californians did not seek legal assistance for their civil legal problems.

**CALIFORNIA PARAPROFESSIONAL PROGRAM WORKING GROUP**

A regulated paraprofessionals program can expand the pool of available and affordable trained, capable providers of legal assistance and can help narrow the justice gap. The State Bar’s California Paraprofessional Program Working Group is charged with developing recommendations for consideration by the Board of Trustees for the creation of a paraprofessional licensure/certification program to increase access to legal services in California.

In July 2018, the California State Bar’s Board of Trustees directed formation of the Task Force on Access Through Innovation of Legal Services (ATILS) after The California Justice Gap Study: Measuring the Unmet Civil Legal Needs of Californians (Justice Gap Study) found that 85 percent of Californians received no legal assistance or inadequate legal help to resolve the civil legal issues they experienced.

The Working Group will commence in April 2020 and is expected to deliver its final report and recommendations to the Board of Trustees no later than July 31, 2021. In maintaining the State Bar’s Stra-
tegic Plan goals and objectives, each recommendation is expected to balance the dual initiatives to ensure public protection and increase access to legal services.

LEGAL DOCUMENT ASSISTANTS

Legal Document Assistants fill a need in the access to justice by helping a niche market. Low income consumers have pro bono legal clinics to help them, the wealthy can afford to pay attorneys’ fees, but the middle class either cannot afford to pay or do not want to pay high attorneys’ fees. They also do not always need legal advice and can represent themselves, but the court forms can be rather intimidating to them. That is where the Legal Document Assistant comes in. We can walk them through the forms and the filing process at an affordable fee.

In 2018, I began looking into the Legal Document Assistant arena because my boss of 10+ years was getting ready to retire and being within a few years of retiring myself, I was looking for something I could do on my own.

In February 2019, I registered as a Legal Document Assistant in my home county of Sacramento, California. I continued to work in the law office until July when I decided it was time to cut the cord. While not the best timing, (who would have envisioned a world-wide pandemic in early 2020) overall it was a great move for me.

The matters I assist with are as varied as the cases in the courts. I have helped with family law matters, criminal expungements, small claims court matters, name change, adoption, probate, etc. Legal Document Assistants can also assist with wills, trusts, and the accompanying documents such as powers of attorney and medical directives. I love the variety of the work and that no two days or cases are the same.

I also keep my Paralegal designation through pro bono work I do with a local non-profit that provides legal services to the low-income community. My work for that organization is supervised by the attorneys who work there.

There are many different avenues that a paralegal can take towards a career in the legal field. The Legal Document Assistant is just one of so many options available. It can also be a decent side gig for those looking for some extra income.

RHONDA S. HARRIGAN has been in the legal field of Sacramento for more than 18 years as both a legal secretary and paralegal. She is now a registered legal document assistant. Rhonda is a board member on the Sacramento Valley Paralegal Association, Sacramento County Bar Association and Sacramento County Bar Foundation board of directors.
Developing Legal Technology Skills to Advance Your Paralegal Career

By Mike Hamilton

Paralegals have an interesting relationship with legal tools and software. For many, use of legal technology has increased substantially over the past five years, with companies choosing to replace manual processes with new automated systems that are more efficient, more accurate, and create time savings on mundane tasks. In fact, according to Exterro’s 2020 Corporate Legal Leaders Survey (https://www.exterro.com/2020-corporate-legal-leaders-survey/), 7-in-10 legal departments are managing their data-related problems by utilizing technology to ensure better outcomes with:

- Litigation
- Data privacy
- Compliance
- Cybersecurity

The reason for this is simple: Exploding data volumes have made it very difficult to utilize manual processes in finding all relevant data that is pertinent to a matter. Whether it’s for an e-discovery matter or fulfilling a consumer data deletion request (a feature of new privacy laws), the goal is the same—to quickly and defensibly get to the facts of a matter—but the landscape has changed: it’s far more difficult to sift through terabytes or petabytes of data than smaller data volumes, and part of the challenge lies in understanding how to reduce those volumes to more manageable levels.

This is where technology comes in. According to the Association of Corporate Counsel’s 2020 Chief Legal Officers (https://www.acc.com/clo2020) survey, more than half of CLOs plan to adopt a new legal technology over the next year, or have done so recently. And nearly 70% think that the trend of using artificial intelligence in the legal department will only accelerate.

As legal tools like e-discovery and compliance software have become more common, they’ve expanded paralegals’ roles and amplified their responsibilities. Understanding what these technologies do and how they are best utilized can help paralegals take the next step in their careers in two ways: by showcasing technological know-how to reduce costs, and improve operational efficiency in their respective legal departments.

Below, we’ll take a look at two of the most effective tools paralegals can get familiar with to establish themselves as go-to tech-pros in their legal departments.

**THE TWO MOST TIME-CONSUMING E-DISCOVERY PROCESSES HAVE EASY SOLUTIONS**

Paralegals who often perform e-discovery work know that no step in the process is easy, but there are two steps that stand out as perhaps the most time-consuming: Collection and Review. Many companies choose to outsource their review, which ends up being the costliest step in the entire process; analyst firm Gartner finds that more than 70% of e-discovery costs take place in the review stage. Outsourcing review to other firms is usually a high-cost endeavor, as legal review isn’t cheap—which means it’s an ideal place to start searching for less expensive options.

The high-cost of legal review is often amplified by the collection process, as large volumes of data mean more time (and therefore money) for outsourced partners to review.

**NARROWING THE FUNNEL WITH AI TO DRASTICALLY CUT E-DISCOVERY EFFORT AND COST**

Paralegals are the eyes and ears of e-discovery projects, and forward-looking CLOs are understanding how AI can help dramatically reduce their legal spend and increase departmental efficiency. The Exterro-Blickstein 4th Annual Study of Effective Legal Spend Management (https://www.exterro.com/resources/2020-effective-legal-spend-management) found that doing more work in-house and leveraging technology to manage e-discovery activities are the two most effective ways to minimize e-discovery spend. “Using e-discovery technology” ranked #1 for effectiveness in controlling legal budgets; the survey also found that most legal departments are prioritizing reducing their collection expenses.

Overall, the three most common types of technology that legal departments rate as the most effective in controlling e-discovery spend are document review, collection/processing, and early case assessment (ECA) technology.
COLLECTION

The right technology solutions answer the most expensive e-discovery concerns, and “learn” from the users while they’re utilizing the technology to become more accurate over time. For the collection process, Smart Early Case Assessment technology is most effective at identifying responsive data prior to beginning the collection process, because it is able to make connections between potentially relevant data types that otherwise may not have been uncovered.

EARLY CASE ASSESSMENT

Early Case Assessment technology helps to “narrow the funnel” by culling useless data earlier in process, leading to a more concise and accurate data set to review. Whereas federal judges such as Hon. Xavier Rodriguez are expecting around 85% accuracy for older identification processes like predictive coding, some Smart/AI technologies are seeing accuracy rates closer to 100%. For this reason, it is no surprise that Exterro’s 2020 Judges Survey (https://www.exterro.com/2020-judges-survey-ediscovery/) found that, by wide margins, federal judges would prefer to see in-house legal teams utilize Smart ECA technology to quickly identify responsive data prior to collection.

REVIEW

For paralegals, a less-daunting set of data to review is just one benefit of AI—which makes in-house review more manageable. During the review process itself, AI can be utilized to identify relationships within the data sets (and help group the data in parent-child format) to find responsive ESI after only a small percentage of the data set has been reviewed. In a practical sense, this means that a paralegal may only need to review as much as 5% of the data corpus before the AI—watching and “learning” in the background—is able to understand what the reviewer is looking to accomplish. From there, the remainder of the corpus can be scanned by AI to find the most responsive data.

CONTINUING EDUCATION FOR PARALEGALS MEANS UNDERSTANDING WHAT LEGALTECH CAN OFFER

E-discovery presents many challenges for paralegals, with new regulatory obstacles around seemingly every corner. The role of the “e-discovery paralegal” hardly existed 10 years ago; 10 years from now, it will likely be common to see paralegals utilizing technology to assist with not only e-discovery, but enterprise-wide Legal Governance, Risk, and Compliance efforts.

With a legal and business background, MIKE HAMILTON is experienced and passionate about creating thoughtful, out-of-the-box educational resources that help keep legal teams interested and on top of emerging need to know e-discovery and privacy issues. Mike has spent the last 10 years working with legal departments to identify cost effective solutions for e-discovery and privacy practices. Mike graduated from the University of Oregon School of Law in 2010.
The Vermont Joint Commission on the Future of Legal Services, at the urging of Vermont Supreme Court Justice Reiber, provided its Final Report and Recommendations to the Vermont Bar in September of 2015 on how to increase access to justice for Vermonters.

Within the Joint Commission’s Report was the Legal Education Committee’s strong recommendation that Vermont adopt a paralegal licensing program. Unfortunately, this recommendation has since languished, but the problems with access to justice in Vermont remain.

Members of the VBA Paralegal Section, Carie Tarte, RP®, Corinne Deering, RP®, Lucia White, CP, and Lynn Wdowiak, in conjunction with Dan Richardson, then-President of the VBA when the Joint Commission Report was issued, now examine whether or not Vermont is ready for paralegal licensure and whether or not paralegal licensure is an appropriate solution to Vermonters’ lack of access to justice.

This is the first in a two-part series that explores why Vermont is ready for some form of voluntary paralegal licensure and how paralegal licensure can increase Vermonters’ access to justice. The second part, written by Attorney Dan Richardson and Paralegal Lynn Wdowiak, will run in the Vermont Bar Journal’s Spring edition, and will review why paralegal licensure may not be an appropriate answer for Vermont.

STATISTICS TELL US VERMONT IS READY

As stated in The Vermont Joint Commission on the Future of Legal Services report, almost three quarters (72%) of Vermont’s civil docket is comprised of small claims, collections, landlord-tenant disputes, divorce, and parentage cases. What’s more, according to the Vermont Access to Justice Coalition, eighty percent (80%) of all cases in Vermont’s docket today have one or more self-represented litigants.

Access to justice at its core involves basic fundamental rights for Vermonters and the stakes are high: losing housing in foreclosure or evictions, losing custody of a child, losing assets in a divorce, or losing money in a collections action. In 80% of these cases, where fundamental rights are on the line and the stakes high, Vermonters are representing themselves.

The main solution thus far in Vermont has been to make the necessary forms and information available on-line. While this increases access to the forms and statutory language, it does little by way of increasing access to “justice.” It is the equivalent of offering to increase transportation options for someone by providing him or her with a free, but completely disassembled car.

The Vermont Paralegal Organization (“VPO”) has received many requests from pro se litigants over the years asking for assistance on how to complete these online forms and guidance as to how and in what court the forms should be filed. Such requests for assistance to the VPO must go unfulfilled, as they would put paralegals in a position of providing legal advice, and hence, engaging in the unauthorized practice of law (“UPL”).

The number of questions about forms and the litigation process that the VPO has received pales in comparison with the number of questions our State court clerks field from pro se litigants on a daily basis. Not only are court clerks inundated with legal questions (placing court clerks in the position of potentially dispensing legal advice), once pro se litigants get before judges in merit hearings, they often have no idea how to submit their documents into evidence, nor do they always have the “evidence” or documents helpful or necessary to their case.

In fact, they may not even realize that a merits hearing is dispositive on their matter. This creates backlog for the court docket as judges are spending their time talking litigants through the evidentiary rules and process and ultimately postponing hearings until the appropriate evidence can be obtained.

Now imagine a Vermont judicial system in which there is a pool of non-lawyers available (paralegals in particular) who have met certain educational and work experience criteria in a particular area of law, who have been specifically trained in Vermont law for divorce, child support, collections, and landlord-tenant disputes, who have passed an examination on those specific areas of law and have been licensed by the Vermont Supreme Court to assist litigants in those limited legal specialties.
These fictitious licensed paralegals would be capped at what they could charge for services to assist pro se litigants, and while they would not have to work under the direct supervision of an attorney in their designated specialized legal field of license, they would have available a Vermont licensed attorney to consult with through a “collaborative agreement,” similar to those used between a physician and physician’s assistant. Such a system could work to substantially increase access to justice for those Vermonters with no intention of hiring an attorney to assist them because they are both too “rich” to qualify for legal assistance through grants and other funding, and too “poor” to be able to afford the services of a lawyer.

THE RESOURCES EXIST IN VERMONT--TO AN EXTENT

Utilizing a pool of licensed paralegals taps into an already existing resource in Vermont. According to the Economic and Labor Market of the Vermont Department of Labor, as of 2018, there are approximately 670 paralegals in Vermont. While not all of the State’s paralegals would opt to undergo voluntary licensure, a larger majority may if the process is straight forward and not cost-prohibitive.

Even if only ten percent (10%) of Vermont’s paralegal population were to become licensed, it would mean the availability of more than 60 licensed paralegals to assist the pro se divorce litigants in accurately and timely completion their 813 Financial Affidavits, or to assist pro se tenants in appropriately compiling the necessary documentation for their merits hearing in their dispute with their landlord.

In addition to helping pro se litigants identify and prepare forms, a Vermont licensed paralegal could help increase judicial efficiency by explaining to litigants rules like service of documents on all parties and what evidence may or may not be relevant to their case. He or she could also help litigants organize and outline their case. Litigants who appear in court prepared with this type of information would allow judges to focus on the contested issues without spending as much time on the process.

While Vermont does have the paralegal resources and overwhelming need to increase access to justice, it does not have the staffing or infrastructure to establish an elaborate, lengthy and financially impractical process for paralegals to obtain licensure. One of the major criticisms and likely detractors to the full success of the Limited License Legal Technician (LLLT) program in Washington State is the prohibitive educational and work requirements. Because of the extensive requirements just to sit for the examinations, very few paralegals in Washington have opted to obtain LLLT status. As a result, the costs to implement the LLLT program far exceed the income from participating paralegals.

Utah, the second state to develop a paralegal licensure program, has requirements similar to Washington’s LLLT program, but much less daunting. Utah has approved Licensed Paralegal Practitioners (“LPP”) to obtain licensure in specific family matters, small claims, and forcible entry and detainer. Utah’s program was enacted in November 2018, so there is little information on its current impact. Like the LLLT, applicants in Utah are required to have at least an associate degree. However, the course requirements are far fewer - an ethics course plus a subject matter course for each area in which they plan to practice - and the pre-application work requirements are half that of the Washington model.

Any paralegal licensure in Vermont would need to be straight forward, attainable, and essentially self-funding. Paralegals would pay for their course requirements and would pay similar licensing and renewal fees as attorneys (application fee, examination fee, character and fitness/background check fee). They would also be required to obtain their own malpractice insurance, as well as meet continuing legal education requirements on a biennial basis. As Vermont’s Bar Counsel, Michael Kennedy, noted in his December 9, 2017 blog about paralegal licenses, “we shouldn’t make perfect the enemy of good.” In other words, “the goal shouldn’t be to provide people who can’t afford lawyers with access to something that walks, talks and looks like a lawyer. It should be to provide them with something that is better than they have now—which is nothing.”

Vermont licensed paralegals would obviously have rates considerably lower than those charged by a lawyer. It is likely that most Vermont paralegals would remain employees of law firms or corporations, in addition to offering limited legal assistance to the public under a licensing program. Having a licensed
paralegal offer limited services can benefit the law firm by providing independent revenue, as well as freeing up the attorney’s time for more complex matters.

Paralegals with the requisite education, experience and specialty training to become licensed paralegals would not have to carry the heavy debt from law school in order to become a licensed paralegal. At most, they would be paying course fees, licensing fees, examination fees, continuing education fees and malpractice insurance fees. As long as these fees remained reasonable and attainable, paralegals desiring to become licensed in specialty fields to assist with access to justice would be able to charge lower, more reasonable rates to the public who cannot afford to hire a lawyer.

Through paralegal licensing, albeit in a limited fashion, the public is thereby protected from the unauthorized practice of law. In many cases, unrepresented litigants are forced to seek information and assistance from the internet, legal software packages, and in the worst case, independent, unlicensed, “non-lawyers” offering services without any oversight from an attorney.

By allowing licensed paralegals to practice in specialty areas, these trained professionals would be available to assist those people who might otherwise be forced to seek alternative cheaper, less reliable methods of obtaining help. Ensuring that paralegals meet the requirements of holding a limited license to practice in specialty areas would go a long way to reducing the unauthorized practice of law.

Many other states are looking at forms of licensure, regulation, or certification of paralegals to increase access to justice. The Empire State Alliance of Paralegal Associations, Inc. (“ESAPA”) recently announced that the majority of paralegals in New York State support voluntary certification. As a result, ESAPA unanimously voted to proceed with creating a state-wide voluntary certification program.

ESAPA anticipates implementing the full program in January of 2021. While other states immediately surrounding Vermont may not be actively pursuing a licensure, regulation or certification program for paralegals, states in other parts of the country are establishing these programs or further investigating forms of regulation, certification or licensure.

Certification of paralegals could be a stepping stone to licensure or regulation, also furthering access to justice, as long as the requirement of full attorney supervision is modified. A model in which paralegals are not required to remain under the supervision of attorneys in limited areas is preferable to one which continues to require attorney supervision.

Paralegals can already seek voluntary certifications from nationally available programs where all of their work currently requires attorney supervision. Adding another option for certification does not seem like it would address the current abundance of pro se litigants because it does not represent a substantive change in our current system. If attorneys are not currently accepting the types of matters that have an abundance of pro se litigants, it is doubtful that having a certified paralegal on staff would change that dynamic, since ultimately, attorneys would be required to supervise (and charge for the supervision of) the paralegal’s work.

Some states may establish a state certification, with a modified supervision requirement, in order for trained paralegals to actually “practice” in a specified limited capacity, thereby allowing further access to justice. As long as full attorney supervision is still a requirement, however, the system is simply operating under the existing parameters, thereby denying lower income litigants access to justice. Moreover, it is unlikely that paralegals would go through the time and expense to become specially trained, to invest in malpractice insurance, and to take an exam, only to be in the same situation in which they are currently functioning under direct supervision of an attorney.

Seeking a standard of education, experience, and qualifications to be a licensed member of the paralegal profession only protects employers and the public, and at the same time can increase access to justice with the assistance of qualified professionals.

It is the wave of the future across the United States and soon more and more states will be following suit, in one way or another, to develop solutions to the gap in justice for lower income litigants and to establish standardized criteria for a professional that is in a position to help fill the gap. All of this is not to say that licensed paralegals are the only answer, but it is to say that licensed paralegals can and should be an answer.

NOTES:

Prior to sitting for the licensing examination, paralegals in Washington State interested in becoming LLLT must first complete a minimum associate level degree with 45 of the credits completed in an ABA-approved paralegal program in courses defined in the LLLT regulations plus an additional 15 credits through the University of Washington School of Law in the specific areas of law they wish to become licensed in, and work a minimum of 3,000 hours under the supervision of a licensed lawyer.

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**New Credentialed NFPA Paralegals**

NFPA wishes to congratulate the newly minted NFPA-Credential Holders!

Maria Aparicio, CRP™ - US Army
Sheila Bailey, CRP™ - Auburn, WA
Caroline Baxter, CRP™ - Dallas, TX
Jeane Bird, CRP™ - Big Chimney, WV
Autumn Blake, CRP™ - Salem, OR
Janese Bodin, CRP™ - Antioch, CA
Marissa Bozeman, CRP™ - US Army
Peggy Busceni Grady, CRP™ - Lake Villa, IL
LeeAnn Cargile, CRP™ - Spokane, WA
Nydia Colon, CRP™ - Waukegan, IL
Lindsay Degastyn, CRP™ - Christiansburg, VA
Anna Deux, CRP™ - Scottsdale, AZ
David Dobson, CRP™ - US Army
Kathryn Eickhoff, CRP™ - Hot Springs, AK
Christopher Fitzgerald, CRP™ - Lake Forest, IL
Susan Gary, CRP™ - Parker, AZ
Tea Godfrey, CRP™ - Portland, OR
Jordon Grimes, CRP™ - US Army
Victoria Hartogh, CRP™ - Palatine, IL
Michael Hoselton, CRP™ - Brightwood, OR
Victoria Hartogh, CRP™ - Palatine, IL
Eric Jogerst, CRP™ - US Army
James Keeling, CRP™ - US Army
Agata Kiejzik, CRP™ - Hawthorn Woods, IL
Sandra Lamonica, CRP™ - Chicago, IL
Kellie Manzone, CRP™ - Bridgewater, MA
Christian MasudaCastro, CRP™ - US Army
Monica Moore, CRP™ - Dallas, TX
Nicole Morrissey, RP® - Deerfield, NH
Brandi Moses, CRP™ - Plano, TX
Nicholas Piper, CRP™ - US Army
Tracie, Reynolds, CRP™ - Antioch, IL
Danielle Sepanski, CRP™ - Kenosha, WI
Tammy Summers, CRP™ - Veradale, WA
Michele Suris, CRP™ - Round Lake Beach, IL
Alex Tabatabai, CRP™ - Gaithersburg, MD
Christopher Teran, CRP™ - Denton, TX
Heidi Sanchez, CRP™ - Lakewood, WA
Chris Sorum, CRP™ - Concord, NH
Nathaniel Speier, CRP™ - Tacoma, WA
Courtney Tharp, CRP™ - Brownsburg, IN
Mary Vogt, CRP™ - Grayslake, IL
Ranae York, CRP™ - Yakima, WA

Additionally, there is one additional CRP™ in Illinois who opted out of publication.

Questions about NFPA’s certification programs or how you can obtain your paralegal credentials can be submitted to certifications@paralegals.org
A surety bond may be required for a range of activities including gaining a contractor’s license to appealing a court case to obtaining a mortgage broker license. But what exactly is a surety bond? What is suretyship in general? And how is surety different from regular insurance?

WHAT IS SURETYSHIP?

Let’s start at the highest level: what exactly is suretyship? Suretyship in its simplest form is created when one party guarantees the performance of another party. The surety bond is what guarantees the performance. The parties to a surety bond are the principal, the person or organization primarily bound by the bond given by the surety; the obligee, the party to whom the bond is given and is therefore protected against loss due to the guarantee of performance; and the surety, the party who answers to the obligee in the case of a lack of performance who then is indemnified by the principal after payment for failure to perform an obligation to the obligee.

The surety is the party that becomes obligated to the obligee upon failure of the principal to perform. This seems like a standard insurance occurrence. But what makes the surety agreement unique is that after the surety pays for that failure to perform, the principal indemnifies the surety for the amount paid on the claim by the principal. Underwriters strongly consider the principal’s ability to indemnify the surety in making their decision on whether to bond the principal.

The bond is the surety’s form of vouching for the principal’s trustworthiness and ability to perform while functioning as a form of protection for the obligee. The surety, however, is not expecting any losses on these bonds. Either the principal performs as expected, and nobody suffers any losses, or the principal fails to perform and the surety is indemnified by the principal.

Surety bonds usually do not terminate until the obligation has been fulfilled or completed. A bond such as an estate bond might cover obligations extending over years while a blasting permit might be fulfilled in one night. Underwriters have to consider the length of the obligation in their determination as to whether the principal is likely to complete the obligation adequately.

The bond amount is the amount of which the surety’s obligation on the bond extends to. The surety’s obligation usually does not exceed the bond amount even if damages for failure to perform exceed this amount. A financial guarantee bond, however, obligates the surety to pay a certain amount if the principal does not perform. Medicare and Medicaid bonds are an example of these. They are very carefully underwritten due to this hazardous nature.

Despite indemnity differentiating surety from general insurance, there are multiple similarities between the two. They are both risk transfer mechanisms, state insurance commissioners regulate them both, and both provide for financial loss. The main difference is who pays for that loss ultimately. In regular insurance, the insurance company pays; in surety, the principal is ultimately responsible.

WHY DO COURTS REQUIRE SURETY BONDS?

Court bonds, such as appeal bonds, may be required in court proceedings to enable a party to pursue a remedy in court. Fiduciary bonds guarantee the faithful performance of court appointed fiduciaries such as executors, administrators, guardians, and trustees.

These surety bonds may not be the most well-known aspect of the court system, and often fly under the radar of even seasoned lawyers, but are important parts of the legal system.

An appeal bond, also known as a supersedeas bond, is the bond a losing party is required by the court to file in order to secure its right to appeal and stay a judgment. While both state and federal courts require appeal or supersedeas bonds, the amount of those bonds may vary by jurisdiction.

A conservator is appointed to assist with the financial needs of a minor, disabled, or elderly person and may be required to obtain a conservator bond to protect the interests and affairs of the conservatee in accordance with the applicable state law. The requirements of the bond may vary from state to state.

An estate bond is also referred to as a probate bond, fiduciary bond, administrator bond, personal representative bond, or executor bond. This bond is required by a court and protects the interests of the estate and its beneficiaries in accordance with state law. The requirements of this
bond may vary by state and county where the descendant lived at the time of death.

A guardian is appointed to assist with financial needs of a minor, disabled, or elderly person and may be required to obtain a guardianship bond to protect the interest and affairs of the ward in accordance with the applicable state law. The requirements of the bond may vary from state to state.

A trust is a document created by a settlor that provides how property and assets within a trust are managed and distributed to trust beneficiaries. A trustee may be required by the trust document or a court to obtain a trustee bond to protect the interests of the trust beneficiaries. The amount of the trustee bond is usually determined by the trust document.

A referee is a person appointed by a court to sell real estate or other assets at issue in a litigation and may be required to obtain a referee bond to secure the referee's obligations as required by the applicable state law. The amount of the referee bond may be set by the court, and is generally based on the value of the assets in dispute.

A receiver is a person appointed by the court to receive assets, property, and control of a company pending final decision of a lawsuit. A receiver may be required to obtain a receiver bond to secure the receiver's obligations as required by the applicable state law. The amount of the bond is generally set by the court.

SURETY BOND UNDERWRITING PROCESS

So how exactly is the underwriting done on surety bonds? Each company has its own guidelines and criteria but the same basic factors are taken into account by most surety companies. First, they look at capacity: whether the prospective principal has the skill and ability to perform. Then they look at capital: does the company have the financial condition to justify approval of the risk here? Lastly, they look at character: are there any indications that the applicant isn't of good character and unlikely to perform due to those reasons?

If the underwriter can't approve the bond based on the principal's given qualifications, collateral might bridge the gap to gain them approval. Many bonds are written on this basis and provide protection in the case of failure to perform.

GET A SURETY BOND ONLINE TODAY

Colonial offers a direct and digital way to obtain surety bonds. We are the insurance company — which means no agent, no broker, and no middleman. We make it easy to obtain your bond instantly. The steps are easy — get a quote online, fill out your information, satisfy underwriting requirements, and enter your payment method. Print or e-file your bond from your office. It's that simple!
Legal writing has a specific framework that begins with a strong foundation; grammar, spelling, vocabulary, and tone are our essentials. Whether you are writing demand letters, motions, discovery, or letters to clients, these foundations are keys to bringing out what you want to say. Judges, lawyers, and Legislators in their work use words to persuade, inform, advocate, and argue. We, as Paralegals, provide their foundation through our writing skills. The stronger our writing, the more powerful their arguments are. Specific rules and structures should be followed. It is our job to provide the base for which the attorney’s case is made.

The written word is one of the most important tools for those in the legal profession. In the past, this was a task done exclusively by attorneys. Today, more supervising attorneys are passing the job to their Paralegals.

One of the first things all Paralegals should have is confidence and a strong voice. When you are writing, you create an image with your words. It represents a level of competence that will avoid any misunderstanding of your point.

I have found reading challenging material such as opinions and briefs, paying attention to the tone, structure and vocabulary are useful. You develop an understanding of how certain documents are structured.

Being a sports fan, I approach writing like refereeing a football game. If it’s done well, it goes unnoticed. If it’s done poorly, it creates havoc. Consider your writing as painting a picture. Each word is a color on your palette. Word-choice matters. Take the reader on a guided tour to your outcome. All professions require an element of articulation whether done verbally or in writing. Paralegals especially need to develop their communication skills if they are to find success in the legal profession. The following are some skills to consider.

ENVISION

Before you type even one letter, envision a clear idea of what you want to say. Vocalize your objective out loud and be as specific as you can: “I want this employer to see that I am perfect for the job,” or “This client must understand the decision that came out of the meeting.” The better you can articulate your objective, the easier it will be to write down, and the more effective the writing will be.

OUTLINE

At one point or another, we all have writer’s block. The most difficult for me is the horrible “P” word – procrastination! I really procrastinate. But when I sit and prepare an outline, the juices get flowing and the writing easier. This kind of organized structure in your legal writing will help guide the reader through your text. Simply put, it promotes readability.

WRITE

Now that you have your objectives firmly in your mind, secure them on paper or on the screen. In other words, create your canvas. It is easier to edit writing, rather than come up with something new, so just try to get words out as a starting point. Don’t worry too much about sentence structure, spelling and grammar, or the nuances of fine creative writing at first. Just get started and put some words together.

KNOW YOUR AUDIENCE

Are you writing for a client? An adversary? The court? Make sure you understand your reader’s point of view, so you don’t aim too high or too low.

HEADINGS

Your headings organize the argument section into primary and subsidiary parts. Headings should be concise and conclusory statements about a legal issue written in a complete sentence. This also goes to the idea of omitting wordy words as noted below.

REVIEW FOR CONTENT

Go back to the beginning and re-state your objective. Now read what you have just written. Does it say what you want it to say? Don’t worry about how pretty the language is; just make sure the ideas are in place.

CONSIDER THE BEGINNING AND THE ENDING

No one will read a piece of work if the beginning doesn’t lure them in, so make sure that you begin strong. Stating your objective is an effective way to do that. Also, the final sentences will be the last impression in the reader’s mind. Make sure your words are powerful enough so that the reader remembers them. You can even re-state the objective if you say it in a new way.

AVOID BEING TOO WORDY

When you avoid unnecessary words, your work will seem more fluid.
USE PASSIVE VOICE TO DIMINISH THE OTHER SIDE

Although you should be using active voice, using a passive voice is useful in this context. “The defendant breached the contract.” vs. “The contract was breached by the defendant.” Passive voice creates distance between you, your client, and what’s occurring. It makes them an object in the sentence rather than the reason for the sentence. Unfavorable facts should always be noted in the passive voice. Acknowledge it, diminish it, and move on.

READ THE DOCUMENT ALOUD

My co-workers must wonder if I’m crazy because I talk to myself. (No comment.) However, usually it is because I am reading aloud the content of my writing so I can hear mistakes like sentence fragments or run-on sentences that might have been missed when writing. A sentence should sound complete and express only one main idea. Make sure your sentences are grammatically sound. You may want to have other people read and edit your work if you are unsure about this.

READ IT BACKWARDS

This takes all context away from each individual word and makes spelling errors leap off the page. Nothing says “I don’t really know what I’m doing” more than spelling or grammar errors.

BE UNIQUE

We are all bombarded with the written word copiously. You will need to stand out. And purple Wingdings as a font choice is not the way. Consider replacing clichés like ‘leap off the page’ with something fresh and original, like ‘stand out like goose bumps in the arctic.’ Be yourself and let your rareness shine through your words.

PROOFREAD

Of course, always make sure grammar, punctuation, word choice and format are in order. Take time to proofread for grammar and fact checking cites.

Whether you are new to the field or a veteran, I hope some of these reminders will inspire a new passion for great legal writing. It is very rewarding when you know you have produced a well-written document. And remember, every excellent Paralegal knows how to write well. Legal writing can be intimidating, even for the most seasoned legal professional, but it doesn’t have to be.

MARY K. MAYER is a CORE Registered Paralegal with the Yavapai County Public Defender’s Office in Prescott, Arizona. Mary has been in the legal field for over 30 years and is passionate about the law. She is a former Board Member and current Member of Arizona Paralegal Association. mkmayer88@gmail.com

RESOURCES:
- 9 Steps to Better Writing for Paralegals … et al. by Gail Armatys, Jul 16, 2013 3:18:00 PM, Blogger Through Paralegal.Edu, Center for Advanced Legal Studies;
- “Advanced Writing Skills for Paralegals,” an on-demand course taught by Joe Zavaglia, Esq.; February 20, 2015,
- Legal Writing for Paralegals: 3 Ways to Improve Your Writing, By Legal Studies Categories; The Writing Center, Georgetown University Law Center 2018, Writing Effective Point Headings.
-
Equity: More Than a Refrain

By Sybil Taylor Aytch, RP®, M.Ed. and Stefanie Trujillo

The word “Equity” is often seen and heard in news articles, classroom settings, and certainly all over social media. But is it being heard and seen in your workplace, and is it being promoted and included in the framework of your firm’s Diversity and Inclusion initiatives? For those who come from marginalized or under-represented communities, or those who care about advancing these communities, “Equity” is more than merely another refrain.

THE MEANING OF EQUITY

It is not possible to have true Diversity and Inclusion without Equity. Equity is itself the bellwether of the Diversity, Inclusion, and Equity model. While Diversity provides a quantitative representation, and Inclusion is added to the mix to allow one to be accepted as their true and authentic self, Equity denotes our deepest understanding of its nuances and intricacies. It recognizes the historical legacies and current realities of discrimination and prejudice experienced by marginalized or under-represented communities.

In order to be truly inclusive, it is imperative to operate within an Equity lens, the process for analyzing and diagnosing the impact of the design and implementation of policies on marginalized or under-represented individuals or groups, and to identify and eliminate potential barriers. Equity requires the fair treatment, access, opportunity, and advancement of everyone, while identifying and eliminating barriers that have prevented the full participation of marginalized or under-represented individuals or groups.

Equity comprises three components. The first component is Supremacy; the ideology that one cultural group is better than another cultural group. This is largely a dynamic related to power, access, and a perception of superiority.

The second component is Power; the social capital gained by being a member of a group that has supremacy. This is demonstrated in the workplace by better evaluation assessments and better access to mentors and other resources for success.

The third component is Privilege; the unearned advantages and benefits gained by members of a group that has supremacy. This is exemplified by being able to speak the way you want and wear what you want to wear, without judgment or recrimination.

To further grasp the meaning of Equity, it is important to understand that the term is not synonymous with Diversity, Inclusion, Equality, or Justice. In fact, many have confused Equality and Equity, yet they have two very distinct meanings. Equality is letting everyone in, while Equity is giving everyone the tools they need to succeed after being let in. Essentially, Equality is giving everyone shoes, while Equity is giving everyone shoes that fit. We must be very clear on the meaning of each of these terms in order to address inequities and reach viable solutions.

WHY EQUITY IS IMPORTANT

Equity further denotes identifying inequitable systems, course-correcting and building equitable systems that are designed to work equally for everyone. Historically and currently, many of our systems were built to sustain inequity. Because these systems are doing exactly what they were designed to do, contemporary events heavily highlight significant disparities in education, health, wealth, and justice.

REBUILDING EQUITABLE SYSTEMS

Rebuilding equitable systems requires an understanding of the data behind the system and/or community sought to be rebuilt. This undertaking includes examining a model such as World Trust, which identifies the history, culture, and identity of the system/community and understands internal and external factors, such as the personal and institutional manifestations of bias (The System of Inequity).

Many, if not all internal and external contributing factors are the core of what perpetuates inequalities. In order for change to occur and the dismantling process to commence, these contributing factors must be discontinued at both the internal and external level. The tools and resources needed to build an equitable system must also be identified and utilized so that the same services are provided for everyone, regardless of identity.

Building equitable systems is extremely important as old inequitable systems are dismantled to accommodate the increase in diversity. Now more than ever, we live in a world where a person’s identities intersect, which creates its own unique challenges and barriers related to disadvantages and privileges.

For example, the experiences of a white LGBTQ+ individual compared to a person
Diversity asks: who’s in the room? Inclusion responds: who’s trying to be in the room but can’t, and whose presence in the room is under constant threat of erasure.

Inclusion asks: has everyone’s ideas been heard? Justice responds: whose ideas won’t be taken seriously because they aren’t in the majority.

The color who identifies as LGBTQ+ can vary significantly. While both individuals share in LGBTQ+ identity and oppression, adding the intersection of race decreases access to necessities such as healthcare for those of color because there is no shared privilege based on supremacy.

As a society, it is prudent to be more aware of intersectionality so that we can become more innovative in identifying and dismantling inequitable systems. In the workforce, some of the most recent examples of eliminating gender-based bias includes extending paid leave to all parents, regardless of gender. Reviewing resumes without the candidate’s name has helped eliminate some racial and ethnic bias during the recruitment process.

**WHY DIVERSITY & INCLUSION EFFORTS FAILED IN THE PAST**

Prior diversity and inclusion efforts failed all of its participants and yielded poor results. This supposition was based on the notion that “Diversity” and “Inclusion” were initially only synonymous with race and had heavy negative connotations. Most, if not all, efforts were geared towards some people, not transforming the environment to include all people (Hecht, 2020).

There was no celebratory distinctions related to the differences across races, and no shared history about people of color, who invented and contributed to society, was introduced. Rather, oppression was the main highlight of the trainings, which resulted in feelings of resentment, or blame, depending on an individual’s identity.

Furthermore, many of the initiatives undertaken in the workplace did not result in creating a more diverse or inclusive environment. An employer merely attending the same diversity and inclusion trainings for years, with no actionable steps, or attending the same job fairs, without the hiring of any diverse candidates, are examples of failed initiatives (Stanfield, 2018).

Leaving equity out of the equation was detrimental to its success. It was not until recently that Equity was deemed a necessary component to ensure measurable success in Diversity and Inclusion work. Without Equity, the unique challenges and needs of certain identities are ignored, thereby, passively demonstrating privilege and not creating the changes sought. Simply giving one access (equality) is not enough. Providing access along with the tools necessary to thrive in the environment (equity) was the missing element.

**MOVING FORWARD**

An action is a thought made manifest (Coelho). Progress cannot be effectuated in addressing disparities in education, health, wealth, employment, and justice until we examine and remove the exclusionary barriers in all communities. Closing these gaps requires that we do the work every day, everywhere, and on every level, with Equity resounding as more than a mere refrain, but as a chorus in our quest for a more just and equitable world.

**RESOURCES**

NFPA Annual Awards Recognition

NFPA honors and congratulates the 2020 award and scholarship nominees. Winners will be announced at the NFPA Annual Convention. Nominees who have made tremendous contributions to the paralegal profession have been announced for the following categories:

**WILLIAM R. ROBIE LEADERSHIP AWARD** -
This award recognizes an NFPA member in honor of the Honorable William R. Robie and his dedication to the paralegal profession, the expansion of the delivery of legal services and equal access to justice for all Americans.
- Sybil Taylor Aytch, RP®, M.Ed.
- Barbara H. Peppersack
- Christine Hansen

**OUTSTANDING LOCAL LEADER AWARD** -
This award recognizes an individual NFPA member for outstanding local leadership contributions to his or her local association.
- Amy Conrad

**JUSTICE CHAMPION AWARD** -
This award recognizes a practicing paralegal whose conduct, actions, and activities demonstrate extraordinary dedication to diversity and inclusion as defined in NFPA’s Position Statement on Diversity, Inclusion, and Equity.
- Maren Schroeder, RP®, MnCP
- Aaron B. Bath, CEDS, RP*

**PARALEGAL OF THE YEAR AWARD** -
This award recognizes an individual NFPA member whose on-the-job achievements have contributed to expansion of the paralegal profession, including contributions to his or her employer, colleagues and the paralegal profession in general.
- Anthony Sipp
- Laura A. Kehoe, CRP
- MaryAnn Ivie, RP*
- Jamie Holzer, MnCP

**INDIVIDUAL PRO BONO AWARD** -
This award recognizes an individual paralegal who has exhibited extraordinary dedication to the delivery of quality legal services to a portion of the population that cannot afford to pay for legal services.
- Kimberly Kasper, MnCP

**PCCE SCHOLARSHIP** -
This scholarship covers the costs of a review manual, an online review course, and the exam fee for the Paralegal CORE Competency Exam® (PCCE). This scholarship is sponsored by the Paralegal Education Group.
- Julianne Di Benedetto
- Cynthia Surber
- Kasie Sweeney

resources continued


Coelho, Paulo. Like the Flowing River (Sant Jordi Asociados, 2009).


PARALEGALS PLUGIN --
2020 NFPA ANNUAL CONVENTION

The Minnesota Paralegal Association has worked closely with NFPA to put together a great virtual convention experience for everyone! While we may not see each other in-person this year, we’re looking forward to connecting with our colleagues online.

CONVENTION PLATFORM

The NFPA Convention Committee has decided to use Whova (https://whova.com/) as our Convention platform. This will allow us to share schedules, speaker information, exhibitors, and sponsors with our virtual attendees. CLEs, Workshops, and meetings will use Zoom, and the login links will be embedded right into Whova. You’ll receive access a few days prior to the convention to get comfortable with the functions and features.

We’re also excited for the networking features of Whova! Attendees can use the community forum to organize their own informal happy hours or coffee dates (just like we do in-person), by posting their own Zoom links. You can get a free Zoom account that allows for 40 minute “meetings” without paying a dime.

WELCOME RECEPTION

The Minnesota Paralegal Association will host a Minnesota-themed virtual happy hour on Wednesday, October 21st. This will allow folks that aren’t familiar with Zoom to check out the features and make sure their system is set-up correctly. Expect an interactive experience with a game or two and some fun facts about Minnesota. Other social events will be scheduled throughout the weekend and posted to the Whova app.

CLES AND WORKSHOPS

Thursday, October 22

We are excited that most of our speakers committed to the virtual environment, and we were able to secure two new CLEs in the virtual format! This year, CLEs include a full track on Corporate Law and a full track on Litigation.; additionally, you’ll see Immigration, Intellectual Property, Ethics, Technology, and Diversity, Equity, & Inclusion. Keep your eyes on the Convention website (www.paralegalas.org/convention) and Facebook group (https://www.facebook.com/groups/396086911068866), as well as News You Can Use for more details about the CLE speakers.

EXHIBITORS AND SPONSORS

Make sure you visit our exhibitors and sponsors in the Whova platform. There will be opportunities for virtual “meetings,” raffles, and information from our supporters. The first 300 registered attendees will receive a “swag box” in the mail prior to the Convention with goodies from NFPA and MPA, as well as our exhibitors and sponsors. Quantities are limited! Register early to ensure you get your box!

POLICY MEETING

Saturday, October 24
Sunday, October 25

NFPA’s Parliamentarian, Ramona Hill, will return this year! She is excited to work with us in this new format, and is assisting the Convention Committee with developing virtual procedures for the policy meeting. Tom Stephenson, NFPA Vice President and Director of Membership, will be working with the Convention Committee and Ms. Hill to provide pre-convention training for everyone to understand the “What’s” and “How-tos” of Policy Meeting.
CONVENTION CHARITY

When you register, you’ll have the opportunity to donate $5.00 to the 2020 Convention Charity, the Friends of the Boundary Waters Wilderness. The Friends of the Boundary Waters Wilderness is a non-profit organization formed in May 1976, with a mission to “To protect, preserve and restore the wilderness character of the Boundary Waters Canoe Area Wilderness and the Quetico-Superior Ecosystem.” The Boundary Waters contains more than 2,000 backcountry campsites, 1,200 miles of canoe routes, 12 different hiking trails, and is popular for canoeing, canoe touring, fishing, backpacking, dog sledding, and enjoying the area’s remote wilderness character. The Boundary Waters attracts over 150,000 visitors per year to Northeast Minnesota.

The Friends have played a pivotal role in maintaining the wilderness by advocacy and litigation and increasing the size of the wilderness area and limiting motor usage in accordance with the Wilderness Act. It has also had a major role in establishing the nation’s first acid rain laws to protect Minnesota’s aquatic ecosystems, increased buffer zones for aircraft flying over wilderness areas, and raised public awareness on the issues surrounding copper-nickel and other non-taconite mining and logging near the wilderness area.

SCHEDULE AT A GLANCE - SESSION DETAILS ARE ONLINE AT HTTPS://WWW.PARALEGALS.ORG/I4A/PAGES/INDEX.CFM?PAGEID=3823
All times Central

<table>
<thead>
<tr>
<th>Wednesday, October 21, 2020</th>
<th>TBD</th>
<th>Virtual Happy Hour hosted by MPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, October 22, 2020</td>
<td>8:30 a.m.</td>
<td>Concurrent Education Sessions (4 each)</td>
</tr>
<tr>
<td></td>
<td>9:30 a.m.</td>
<td>Break and Visit with Exhibitors</td>
</tr>
<tr>
<td></td>
<td>10:00 a.m.</td>
<td>Concurrent Education Sessions (4 each)</td>
</tr>
<tr>
<td></td>
<td>11:00 a.m.</td>
<td>Break and Visit with Exhibitors</td>
</tr>
<tr>
<td></td>
<td>11:30 a.m.</td>
<td>Keynote - Minnesota Supreme Court Justice Paul Thissen</td>
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<tr>
<td></td>
<td>12:30 p.m.</td>
<td>Break and Visit with Exhibitors</td>
</tr>
<tr>
<td></td>
<td>1:00 p.m.</td>
<td>Concurrent Education Sessions (4 each)</td>
</tr>
<tr>
<td></td>
<td>2:00 p.m.</td>
<td>Break and Visit with Exhibitors</td>
</tr>
<tr>
<td></td>
<td>2:30 p.m.</td>
<td>Concurrent Education Sessions (4 each)</td>
</tr>
<tr>
<td></td>
<td>3:30 p.m.</td>
<td>Break and Visit with Exhibitors</td>
</tr>
<tr>
<td></td>
<td>3:45 p.m.</td>
<td>Student Workshop and Member Workshops - <a href="https://www.paralegals.org/i4a/pages/index.cfm?pageid=3824">https://www.paralegals.org/i4a/pages/index.cfm?pageid=3824</a></td>
</tr>
<tr>
<td></td>
<td>5:00 p.m.</td>
<td>Break/Networking</td>
</tr>
<tr>
<td></td>
<td>6:00 p.m.</td>
<td>Board of Directors Meeting</td>
</tr>
</tbody>
</table>
### Friday, October 23, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 a.m.</td>
<td>NFPA Region Meetings</td>
</tr>
<tr>
<td>10:30 a.m.</td>
<td>Morning Break</td>
</tr>
<tr>
<td>10:45 a.m.</td>
<td>NFPA Region Meetings</td>
</tr>
<tr>
<td>12:00 p.m.</td>
<td>Networking/Lunch Break</td>
</tr>
<tr>
<td>1:00 p.m.</td>
<td>NFPA Region Meetings</td>
</tr>
<tr>
<td>4:00 p.m.</td>
<td>Dinner Break/Virtual Happy Hour</td>
</tr>
<tr>
<td>6:00 p.m.</td>
<td>Delegate Caucus (if needed)</td>
</tr>
</tbody>
</table>

### Saturday, October 24, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 a.m.</td>
<td>Policy Meeting - Call to Order</td>
</tr>
<tr>
<td>10:00 a.m.</td>
<td>Morning Break</td>
</tr>
<tr>
<td>10:15 a.m.</td>
<td>Policy Meeting Continues</td>
</tr>
<tr>
<td>11:45 a.m.</td>
<td>Grab your lunch!</td>
</tr>
<tr>
<td>12:00 p.m.</td>
<td>Awards Presentation</td>
</tr>
<tr>
<td>1:00 p.m.</td>
<td>Break</td>
</tr>
<tr>
<td>1:15 p.m.</td>
<td>Policy Meeting Continues</td>
</tr>
<tr>
<td>2:45 p.m.</td>
<td>Break</td>
</tr>
<tr>
<td>3:00 p.m.</td>
<td>Policy Meeting Continues</td>
</tr>
<tr>
<td>5:00 p.m.</td>
<td>Adjourn Policy Meeting</td>
</tr>
<tr>
<td>6:00 p.m.</td>
<td>Delegate Caucus (if needed), networking</td>
</tr>
</tbody>
</table>

### Sunday, October 25, 2020

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>9:00 a.m.</td>
<td>Policy Meeting - Call to Order</td>
</tr>
<tr>
<td>10:15 a.m.</td>
<td>Break</td>
</tr>
<tr>
<td>10:30 a.m.</td>
<td>Policy Meeting Continues</td>
</tr>
<tr>
<td>11:30 a.m.</td>
<td>Passing of the (virtual) Torch to 2021 Annual Convention Host Coordinator/ Oregon Paralegal Association</td>
</tr>
<tr>
<td>11:45 a.m.</td>
<td>Installation of Officers and Board of Directors</td>
</tr>
<tr>
<td>12:00 p.m.</td>
<td>Adjourn Policy Meeting</td>
</tr>
<tr>
<td>2:00 p.m.</td>
<td>Board Meeting</td>
</tr>
</tbody>
</table>

### LOOKING AHEAD

We spent a lot of time telling you about all of the AMAZING things Minnesota has to offer, and we were so disappointed our friends won't have the opportunity to join us this fall. However, we are excited for you to join us in the Spring of 2021 for Joint Conference -- where paralegals will make a splash in the land of 10,000 lakes, if COVID-19 allows.
NFPA Responds to Emergency Situations... Certification FastTrack

By Jessica Kubiak, RP® and Linda Odermott, RP®, OCP

“I can’t get access to my transcripts.”
“My former law firm is not responding to my requests for verification.”
“I can’t get my documents notarized.”
“I can’t get copies of my divorce decree.”
“The Courts are closed.”
“I’ve been furloughed at my work.”
“My state is currently under Stay-At-Home Orders.”

These are just some of the statements we heard from applicants as COVID-19 began impacting the paralegal profession and our certification program applicants, in particular.

Responding to administrative, financial, economic and accessibility issues created by COVID-19, the NFPA Board took action by creating the Certification FastTrack Task Force (“Task Force”). The Task Force is made up of Board Members and advisors who are tasked with collaboratively creating the FastTrack Pilot Program (“FastTrack”) in order to respond to the emergency situations created by Covid-19 and its effects on NFPA’s Credentialing Programs.

It was also designed to increase the number of Paralegal Advanced Competency Exam® or PACE® candidates temporarily by reducing bureaucratic and confusing procedures and reducing costs associated with the RP® and CRP™ Credentials.

The FastTrack program was unanimously approved by the NFPA Board and rolled out within six weeks. The Board also instructed staff to track and report any issues discovered during the pilot time frame. This six-month pilot program allowed the board to be nimble and quickly respond to the extreme situations facing many of our members and paralegal credential candidates by suspending the regular certification program and instituting the FastTrack program in its stead, then NFPA will re-evaluate the success of the Pilot Program.

THE EFFECTS OF THE FASTTRACK EFFECTS ON THE NFPA CREDENTIALING PROGRAM

- Reduction in certification fees
- Streamlined application process
- Reduction of document requirements
- Attestation of candidates to NFPA requirements
- Audit 5% of applications and renewals
- Suspension of the $25 processing fee
- Streamlined Appeal Process

Questions or comments about the FastTrack program should be sent to certifications@paralegals.org.

Members of the Task Force include: VPDM, Tom Stephenson, ILAP; VPDPC, Linda Odermott, RP®, OCP; Region I Director, Brenda Cothary; Region II Director, Lisa Lynch, CRP™, CEDS; Region III Director, Tracey Woosley, RP®; Region IV Director, Cathy Allard, CP; Region V Director, Becky Reedy; Consultant, Michael Reed, Founding Partner, Block|Reed; with additional input and guidance from: Interim Executive Director, Dara Rudick, CEO, MHQ LLC; Certifications Manager, Leslie Johnson; President, Nita Serrano, RP®, AACP; Treasurer, Lori Wagner, RP®, IRP; and VPDPD, Theda Yandell, RP®.

FASTTRACK FEES

- PACE® & PCCE® Application Fees reduced to $250
- PACE® & PCCE® Reapplication/Retest Fees reduced to $150
- PACE® & PCCE® Renewal Fee reduced to $50
- 60 Day Extension or Retroactive Extension fee reduced to $15
STRATEGIC PARTNERSHIPS

Prometric Offers Proproctor® Option to NFPA Certification Candidates

- Two ways to take the exam
- In a Prometric Testing Center
- Through a remotely-proctored, internet-enabled location of your choice using your computer’s camera and microphone
- 24/7 testing capability anywhere in the world, including your own home
- Link to video Demo of the ProProctor® experience
- Click here to check if your computer meets the requirements to use ProProctor® before scheduling
- No additional fees to choose the remote proctoring option

Paralegal Education Group (“PEG”) & NFPA jointly offer Free Review Courses - PACE® and PCCE®

- Exclusive to NFPA and PEG
- Six-month program
- Go Live Date scheduled for June 1
- Member-only, no-cost benefit
- Offering PACE® and PCCE® On-Demand Review Courses
- Access through NFPA Website Member Only Content (NFPA login required)

WASHINGTON STATE SUPREME COURT SUNSETS LLLT PROGRAM IMPACTS LLLT STUDENTS

Due to the deadlines created by the Washington State Supreme Court’s decision to sunset the LLLT Program, many LLLT students must take the Paralegal Core Competency Exam® or PCCE® in the next few months. NFPA is in contact with the LLLT Programs and have extended an invitation for each program to participate in NFPA’s Assurance of Learning Program. The Assurance of Learning Program offers students application discounts and early eligibility options to take the exam, at no cost to the schools. Students impacted by this change should contact their LLLT Program to determine if the program is participating in NFPA’s Assurance of Learning Program. For more details about the Assurance of Learning Program go to https://www.paralegals.org/i4a/pages/index.cfm?pageid=3634.

Find out more details or apply here
https://www.paralegals.org/i4a/pages/index.cfm?pageid=3813

JESSICA KUBIAK, RP® is employed with Daray Law, LLC. as a Paralegal in the Domestic Relations practice. Jessica is an Ohio State Bar Certified Paralegal since 2011, A PACE Certified Paralegal since 2018 and a notary public for Cuyahoga County. She is the current president of the Cleveland Association of Paralegals (CAP) as well as the CMBA Liaison and the NFPA Primary for CAP. Jessica is the current NFPA Certification Public Relations Coordinator, a member of NFPA’s Legislative Committee, a member of the Strategic Planning Committee and the Co-Chair for the Ad Hoc Committee for the Status of the Paralegal Profession.

LINDA ODERMOTT, RP®, OCP is the current Vice President and Director of Paralegal Certification. In 2012, she received her RP® credentials from NFPA and in 2017, Linda received the OCP credentials from the Oregon Paralegal Association (OPA). She currently works with attorneys at the law firm of Dunn Carney in Portland, Oregon, in the firm’s litigation and real estate practice groups. In 2015 and 2016, she was awarded the Paralegal of the Year Award from OPA and in 2015, she also received the Certification Ambassador Award from NFPA.
The National Federation of Paralegal Associations, Inc. (NFPA) believes that paralegals can and should play an integral role in the delivery of cost-effective legal and law-related services. The NFPA has adopted several position statements regarding Non-Lawyer Practice and supports legislation and adoption of court rules permitting non-lawyers to deliver limited legal services.

In early June 2020, NFPA was dismayed to learn that the Washington State Supreme Court had voted to sunset the Limited License Legal Technician (LLLT) program and that a response in time for the appeal was urgent, needing to be submitted by June 16, 2020. A team led by NFPA’s Vice President & Director of Positions and Issues Lori Boris, RP®, MnCP and consisting of Region I Director Brenda Cothary (member of the Washington State Paralegal Association), NFPA’s American Bar Association Liaison and Pro Bono Coordinator Christine Flynn and Regulation Coordinator Cynthia Bynum, MBA, collaborated and drafted a statement in opposition, and completed it in time to be submitted with the appeal. The LLLT Board has expressed sincere appreciation for NFPA’s efforts. We are hopeful that the Washington State Supreme Court will reconsider its decision.

Individuals throughout the United States struggle to afford legal assistance. The LLLT was created to offer affordable options for legal services, particularly in certain practice areas with high demand. As early as 2005, NFPA advocated for the LLLT program. NFPA extends its hand to Washington State to collaborate with lawyers, local and state bar association, legal aid providers and the judiciary to sustain and expand the program. Read NFPA’s Statement to the Supreme Court of Washington State in opposition to Sunsetting of LLLT Program. (https://www.paralegals.org/files/NFPA_Statement_on_WA_St_Sup Ct_Sunsetting_LLLT(1).pdf).

Founded in 1974, as the first national paralegal association, NFPA is an issues-driven, policy-oriented professional association directed by its membership, comprising of nearly 50 paralegal associations and representing a range of approximately 8,000 diverse individual members.

READ MORE ABOUT NFPA’S POSITION STATEMENTS AT HTTPS://WWW.PARALEGALS.ORG/I4A/PAGES/INDEX.CFM?PAGEID=3302
Greater Lexington Celebrates 40 Years

This year the Greater Lexington Paralegal Association (GLPA) is proud to celebrate its 40th Anniversary of serving the paralegal community. The GLPA is made up of paralegals and students from various fields of law who share a common interest in sustaining and promoting the paralegal profession in our area.

The GLPA was initially assembled in 1980, at that time known as the Lexington Paralegal Association, by a small group of determined paralegals committed to expanding their profession. In 1990, the LPA was accepted by the NFPA and became a member. In 1993, the LPA board voted to expand its membership and include paralegals working outside of Lexington but in the surrounding area.

The LPA was then renamed the Greater Lexington Paralegal Association. Since its inception, the GLPA has served as a resource for paralegals to collaborate on ideas and methods by connecting members through social events, virtual forums and discussion boards.

Central Kentucky is home to multiple schools with prestigious Paralegal programs (Sullivan University, Eastern Kentucky University and Morehead State University) and the GLPA is committed to serving students and future paralegals by providing student discussion panels at universities multiple times each year and offering a student scholarship at our annual Christmas luncheon. The GLPA offers a discounted student membership to allow students the opportunity to participate in CLE’s, network with other paralegals and access our job bank.

In addition to serving its members, the GLPA is devoted to and excels in the area of philanthropy and serving the surrounding community. For the last several years our association has sponsored a nursing home gift drive. At Christmas, members volunteer to fulfill a wish list for an elderly resident providing gifts for many who would otherwise not receive a gift at Christmas. Additionally, a successful teddy bear drive was sponsored by the GLPA to provide a stuffed animal for local law enforcement to keep in their vehicle to provide to small children during times of crisis.

Demonstrating the ability of this profession to quickly evolve and adapt, the GLPA has offered Zoom CLE’s to members in lieu of in person CLE’s during the COVID-19 crisis. The association hopes to officially celebrate this milestone at the annual holiday luncheon held in December. Due to the COVID-19 pandemic and social distancing regulations the association was unable to safely gather in July to celebrate this milestone anniversary. The GLPA looks forward to serving its members and cultivating the paralegal profession for many more years to come.

Promoting paralegals in the bluegrass

HEATHER HOLBROOK
Member of the Greater Lexington Paralegal Association, Student Relations Chair and NFPA Primary Representative. She has exclusively worked in Medical Malpractice Defense for the last 10 years and holds the Certified Kentucky Paralegal Designation through the Kentucky Paralegal Association.
30 Years Later: VPO Interviews Founding Member Trudy Seeley

By Carie Tarte, AIC, RP®

My fact-finding mission with Vermont Paralegal Organization (VPO) founding member Trudy Seeley turned into a delve into the transformation of our profession from a paralegal who has lived it all.

Trudy obtained her BA in Philosophy from Western Washington University, and moved to Middlebury, Vermont, to a family farm where she raised six children. She took weekend classes through Woodbury College, which she was allowed to attend without paying full tuition.

After graduation, she began her paralegal career in 1985 at a Burlington firm. The profession was new. Trudy relates: "I stopped in the office about 8 times being told they don't use or know what to do with paralegals." A firm founder saw her in the waiting area yet again and instructed the manager to put Trudy to work since she's around so much anyway. The job wasn't glamorous or sexy. But it was the start of a career that brought her from leaky underground storage tanks to a pharmaceutical compliance department.

Trudy started working evenings copying receipts for a class action lawsuit because the office had one photocopier, and ended providing the firm founder content for parts of his book.

Early on, Trudy networked with paralegals about issues they encountered. Paralegals had no group identity. "If we didn't have any standards around our term 'paralegal,' how would we gain legitimacy or respect?"

Long before social media or e-mail, Trudy contacted her fellow paralegals.

With her investigative skills, Trudy called on Woodbury, and obtained a roster of program graduates. The Vermont Bar Association provided her with a state-wide list of law firms. With a list of over a thousand contacts, Trudy crafted a cover letter and questionnaire and a database to record responses.

AN INVITATION TO JOIN

On March 22, 1990, Trudy's wrote: "Would you be interested in being involved in the creation of a Vermont Paralegal Association (VPA)? Many of us have long thought a forum to discuss our needs, share information and generally provide support for our burgeoning profession would be well worthwhile." She ended with a prophetic statement: "What it becomes will be entirely up to the people who become involved in it."

VPA's first Bylaws looked very much like our mission today: to establish and maintain high standards of education, conduct and integrity among paralegals, to foster, advance and promote the paralegal profession, and to facilitate communication within the Vermont paralegal community and within local, state and national bar associations.

EDUCATING LAWYERS

Trudy recalls that a main focus was educating lawyers and firms on the use of paralegals. "[O]ur 'mission' was not at all appreciated by all lawyers, so we had to be very careful about what we said around our lawyer bosses." Like today, some paralegals were integral parts of firms; others were regarded as errand people with all the "crap jobs." VPA strove to educate lawyers and managers so all paralegals were regarded as essential team members.

It was also important to have different designations, i.e., Senior Paralegal and Junior Paralegal, which could not come, without defining what a paralegal could do. This became the over-arching focus of the VPA. When asked about licensure initiatives, Trudy offered wholehearted support:
"I can go to a faith healer, a chiropractor, homeopath, or masseuse for advice and treatment for what works right for me." People looking for legal help shouldn’t be limited to just the services of a lawyer.

TRAVEL TO TAIWAN

Within its first year, the VPA became the VPO and Trudy remained involved for ten years. Life circumstances afforded Trudy the opportunity for change. Her firm had begun a succession planning process which gave much of Trudy’s work to young lawyers. The farm was no longer prospering, and her youngest graduated high school. Trudy decided to seek new adventures as an English teacher in Taiwan. She didn’t know Chinese, but taught in a full-immersion school. She traveled around by motorcycle, absorbing all that the culture had to offer. In her first year, Trudy survived an earthquake that took the lives of 4,000 people. This did not deter her. Trudy advanced in her teaching career, receiving a Teacher of the Year award.

Trudy returned to the U.S. when her daughter-in-law was preparing to give birth. She worked for a pharmaceutical company, first in their legal department, then in compliance. Regulations forced the company to separate compliance and legal and Trudy saw a way to advance: "In the legal department, there were lawyers and then everyone else. In the Compliance Department, you could advance to Manager, Senior Manager, Officer, and Director."

Trudy became a Senior Manager, speaking to sales representatives around the country about regulations. Trudy later moved to San Diego, near her daughters. For nine months, she worked as an independent consultant, training on reporting requirements.

ACTIVE IN RETIREMENT

Now retired, Trudy lives with her rescue dog, Zach. She serves as a Court Appointed Special Advocate (CASA) for children in foster care, builds structures and scenery at the San Diego Model Railroad Museum, and runs trains for the public once a month. She sits on the board of the San Diego Model Railroad Association and belongs to the National Model Railroad Association. Before the pandemic, she was playing in a local badminton club, swimming with a seniors’ group, and taking guitar and yudelele lessons.

TRUDY HAS THIS ADVICE: “WHATEVER PULLS AT YOUR SOUL-JUST DO IT AND TRY TO FIND A PLACE THAT WILL LET YOU GROW. FOLLOW YOUR PASSION AND YOUR WORK WILL BE BOTH STELLAR AND SUPER REWARDING.”

We appreciate Trudy’s vision and passion to provide Vermont Paralegals with the forum and voice we have today.

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MaryAnn Ivie, RP®

OREGON PARALEGAL ASSOCIATION

HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

Obtaining an NFPA credential has shown my employers I am serious about my career and being a leader in the profession. I have used information from the Reporter in various areas of my job, from locating out of state vendors through their advertising in the Reporter, to picking up hints that help me work smarter, not harder.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

My local association has so many learning opportunities, from CLEs to panel discussions and a helpful newsletter. Over the years, these have been very beneficial. OPA also has a variety of social and networking events and it is great to know such a wide group of people in every age category with such a varied experience of being paralegals.

I BECAME A PARALEGAL BECAUSE . . .

I fell into being a paralegal way back in 1984, before the title was in common usage. My first paralegal job title was actually “Executive Assistant to the VP of Legal” at a utility company. They needed someone to help manage litigation on the in-house side, and they wanted someone with some understanding of how utilities work and are regulated. I had quickly grown tired of my position as a utility analyst (first job out of college) and this seemed like a good “stop gap” while I figured out what to do with my life. I loved being a paralegal from the start and have done so ever since.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

I was trial paralegal for the defense in a wrongful death case featured on what was then called CourtTV. It was quite the experience having to be doubly aware of your every movement and facial expression throughout a week and a half long trial, as well as having to avoid tons of cables strewn across the courtroom and two camera operators.

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?

The most important piece of advice I would give is one an attorney gave me many years ago. When you start to stress out, take a minute and ask yourself, what is the absolute worst outcome of this issue that is causing you stress? Is what you stressing about life or death? Probably not. Pretty much anything short of death is fixable.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

I think the rise of the position of technology in the legal field is the most fascinating thing to watch. Attorneys in general tend to be conservative and are not known for being early adopters. The newer requirements that attorneys to be technologically competent is having interesting effects on the evolving practice of law.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

Paralegals have, and continue to, lead the way in lowering the cost of litigation for clients across the board. In addition, paralegals are being seen in some jurisdictions as a way to increase access to justice for simpler issues that have very real effects on the lives of people.

IF I WEREN’T A PARALEGAL, I WOULD BE . . .

A knitwear designer.

A PARALEGAL IS . . .

A magical being able to tame rampaging attorneys, wrestle mountains of paper into submission, and corral wayward clients with a smile.
WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

In enjoy the friends I have made more than anything. You cannot assign a monetary value on these relationships.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

Hands down, the most important benefit is the networking. Through NFPA, I have met wonderful people from across the country. I know I can contact my friends with questions if I need help or advice.

I BECAME A PARALEGAL BECAUSE . . .

I have always had an interest in the law. However, I knew I did not want to go to law school. Being a paralegal allows me to still be involved in the legal world but not have the stress of being an attorney.

I BECAME A PARALEGAL BECAUSE . . .

WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?

Join and get involved with your area paralegal association. It is not enough to be a member on paper, you have to get your hands dirty. As with anything else in life, you only get out of your membership what you put in.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

The use of computer programs and artificial intelligence in the management of voluminous amounts of documents.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

I am particularly proud of the role that paralegals play in reducing legal fees charged to clients in an effort to make legal services accessible for all.

IF I WEREN'T A PARALEGAL, I WOULD BE . . .

Likely working with animals. If I had the money, I would start a Courthouse Dogs program in Dallas. I could combine my passion for the law and love of dogs!

A PARALEGAL IS . . .

The glue that holds a law firm together!
HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

It is difficult to measure all of the benefits as they are numerous. The quality of the webinars as well as the live CLEs at the conferences I have attended is top notch. The opportunity to interact with paralegals from across the nation has been incredibly helpful – for my legal knowledge, but also for my confidence level and my ability to make a difference in my local association.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

I love having a network of paralegals where I can turn if I need assistance with forms, new areas of law, etc., but more important to me are the friends I have made by being involved with the IPA.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

I am not sure which benefit is the most important, but one of my favorites is the National Paralegal Reporter.

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?

Working primarily in family law these days, my days vary greatly. There are days when I spend the bulk of it working on discovery or drafting motions and others where it feels like I talk to clients all day long. I love that the attorney and I work well together, and she values my contribution. That is the best part of working on a case from start to finish.

I BECAME A PARALEGAL BECAUSE . . .

It was totally unplanned. I answered a blind ad for a clerical position. It turned out to be a law office and I was hooked. I was taught how to be a paralegal and within a year decided to begin my paralegal education. That was 28 years ago.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

There have been a lot of great moments, assisting at trials with great verdicts, helping a hysterical client calm down after a bad ruling, but one moment stands out above all others. It was spending time decompressing after we had to file an appellate brief at the Rotunda (back when you had until midnight to physically drop it off). We (2 attorneys, me and a legal assistant) shared a bottle of wine and talked and laughed for quite a while. It was one of those times when you truly feel like you are a part of a team and that what you do matters.

WHAT ADVICE WOULD YOU GIVE AN ASPIRING PARALEGAL?

Network, network, network. It is so important to seek the advice of seasoned professionals and don’t give up. Your first position may not be the one you truly want, but give it time and work hard because getting your foot in the door is goal number one.

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?

Remember to be kind to yourself and know that this is just what you do and not who you are. You will make it through it, but don’t be afraid to ask for help if you need it.

WHAT IS THE COOLEST/MOST IMPORTANT TREND YOU SEE TODAY (IN THE LEGAL FIELD)?

I think that the access to justice movement is one of the most exciting trends I have seen in nearly 30 years of working as a paralegal. The limited licensing of paralegals to help deliver legal services to the underserved is fantastic.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

This is a tough topic to summarize as it varies widely depending on the area of law in which a paralegal works. From client contact to drafting pleadings to doing research to preparing for trial, paralegals are a huge part of the legal team. Many times paralegals are able to make a huge contribution in providing quality legal work at a lower cost.

IF I WEREN’T A PARALEGAL, I WOULD BE . . .

An event planner. I have helped several people plan weddings in the last few years ago and loved every moment of it.

A PARALEGAL IS . . .

like a diamond – multi-faceted, sparkles when the light is shining on him or her and tough as nails (when necessary).
WHAT IS YOUR TOP GOAL DURING YOUR TENURE AS A REGION DIRECTOR?

My goal as Region Director is to grow Region I. I want to bring in new associations and help current associations gain new members.

WHAT HAVE YOU LEARNED ABOUT NFPA THAT YOU DIDN'T KNOW BEFORE BEING A BOARD MEMBER?

I have learned there is a lot of work that must go on behind the scenes to make NPFA successful. The NFPA Board is a hard-working and dedicated group of individuals who have a passion to make the association succeed.

WHAT DO YOU ENJOY MOST ABOUT VOLUNTEERING ON THE NFPA BOARD?

I enjoy volunteering on the NFPA Board because I want to contribute to a career that I care about and desire to see flourish. I want to see the expansion of paralegal roles and responsibilities.

HOW HAS YOUR VOLUNTEER WORK INFLUENCED YOUR CAREER?

My volunteer work has influenced my career because I have been able to develop new skills, both as a paralegal and as a leader. These skills have benefitted me personally and professionally and helped me grow to be the person I am now.

WHAT IS THE LAST EXPERIENCE THAT MADE YOU A STRONGER PERSON?

The last experience that made me a stronger person is serving on the NFPA Board during a time of change. Change is hard for a lot of people, including me, and experiencing all of the changes within NFPA in the last year has taught me patience, perseverance, and commitment.

WHAT DID YOU LEARN LAST WEEK?

Last week I expanded my knowledge of Zoom and hosting Zoom meetings. Technology is definitely not my forte, so being put in a position to host/lead meetings via Zoom has required me to learn new skills in the technology arena.

WHAT IS THE COOLEST TREND YOU SEE TODAY IN THE LEGAL FIELD?

The coolest trend is the expansion of legal roles for paralegals. It makes me proud to see so many jurisdictions making strides towards allowing paralegals to provide services directly to the public and working towards relieving the access to justice crisis.

IF I WEREN'T A PARALEGAL, I WOULD BE . . .

Working for a baseball team in some capacity.

A PARALEGAL IS . . .

An essential member of a legal team.
AS 2020 COMES TO A CLOSE

SEPTEMBER 22
CERTIFICATION AMBASSADOR, REGULATION REVIEW AND ASSOCIATION LEADERSHIP TRAINING COORDINATORS INTEREST FORMS DUE

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