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Insight

New Texas Law Opens Door for Non-Lawyers to Practice

Texas is at a critical turning point in addressing longstanding legal challenges. Could licensing paralegals to provide legal services to low-income and rural communities close the justice gap?



GS

Gregory Sirico

December 16, 2024 12:00 AM



A new Texas family law could see paralegals practicing in the state alongside formally licensed lawyers, providing many of the same services.

The newly proposed legal program, awaiting final approval from the state's Supreme Court, could soon authorize paralegals and other legal paraprofessionals to provide licensed legal services and counsel to low-income individuals.

The initiative focuses on practice areas including family law, estate planning, probate and consumer debt, aiming to expand access to affordable legal support.

Justices said they hope that giving paralegals and other paraprofessionals the right to practice will help close the "justice gap" in the state, and further address many unmet civil legal challenges.

As per the proposal, both a lack of government resources and staffing constraints have contributed to extending the gap in legal services, preventing practicing attorneys, legal aids and volunteer organizations from best serving local Texas communities that fully qualify for said assistance.

"Ensuring that people, regardless of their economic standing, have access to civil legal services is fundamental to the integrity of our judicial system," said Texas Supreme Court Chief Justice Nathan Hecht in a recent statement.

How Legal Deserts Threaten Families

With only a few major urban hubs dispersed across a vast expanse of rural communities, Texas is a hotbed for legal deserts.

Similar to Maine's recent struggle with a lack of resources and legal representation shortages that spurred a nationwide ACLU response and class action lawsuit, legal deserts continue to persist in Texas, disproportionately affecting family legal services and children in particular.

A legal desert is any rural or remote setting with a severe lack of legal services, representation and resources.

This scarcity of resources leads to many intrastate challenges for legal professionals and residents currently seeking legal assistance for issues ranging from complex family law matters to property disputes.

Legal deserts have created a profound shortage of attorneys and legal aids available for juvenile or other family court proceedings.

This is often due to a limited number of available programs and certifications necessary to prepare attorneys with the skill set needed to best serve vulnerable communities in need.

Making a Bad Problem Even Worse

Rural communities, which typically face the brunt of these legal challenges, struggle to access the legal representation they deserve, giving way to the formation of so-called legal deserts.

According to a 2020 report conducted by the American Bar Association, approximately 1,300 counties throughout the United States have less than 1 attorney or legal professional per every

1,000 residents.

In some instances, legal aid is virtually non-existent for individuals, requiring them to resort to legal resources outside of their immediate community and putting undue strain on struggling families.

Legal deserts in Texas often deal with family legal issues such as custody determination, divorce, juvenile court cases and child welfare proceedings, making the need for governmental response and the formation of a non-lawyer paralegal program even more dire.

Closing the Justice Gap Isn't Easy

Texas is far from the first state to propose that paralegals and other paraprofessionals be utilized to fill the gaps in aid and provide legal assistance to quell the growing strain on specific judicial systems.

But while Texas appears poised to move forward with its new law, not all states have been as successful pushing through likeminded laws. Similar efforts have been halted in several other states, namely in California and Washington.

In 2022, the California State Legislature failed to successfully launch a “legal sandbox” program comprised of paralegals and yet-to-be-licensed legal professionals. The initial goal was to experiment with attorney deregulation and allow highly trained non-lawyer types to offer their legal services throughout the state.

State assemblymembers and fellow supporters of this dramatic legal shift, who co-sponsored the bill's passage, stated that lawmakers remained wary of such a change and expressed their concerns about the severe lapse it would cause to the state's bar attorney discipline system.

The legislation was eventually overturned, with critics of the bill stating that restricting this “legal sandbox” and the function of legal paraprofessional initiatives would help the bar centralize its focus and return to its core mission of “protecting the public.”

Having Second Thoughts

While Washington offered paraprofessionals licenses and the ability to represent underserved communities for years, the Supreme Court decided to end the state's non-lawyer programs in 2020.

Initially launched in 2012, the Limited License Legal Technicians (LLLT) program was created to “respond to unmet legal needs of Washington residents who could not afford to hire a lawyer” by allowing unlicensed paralegals, paraprofessionals and legal adjacent technicians to provide limited legal services to clients dealing with family law related matters.

Before the service was discontinued, paralegals and other paraprofessionals trained in the family law space practiced law on a limited license.

Ultimately, Washington's Supreme Court determined that the LLLT program was ineffective in meeting the needs of underserved or disadvantaged communities seeking legal representation,

support or advice.

Of course, not every state has failed to advance family law reform or reversed course.

Texas' new law looks to join an exclusive yet steadily growing group of other states, including Colorado, Oregon, Arizona and Minnesota, who have established legal programs to license some trained non-lawyer professionals to provide limited legal services.

A New Chapter

Despite the setbacks experienced by other states, the new law in Texas represents a renewed and revitalized dedication to granting paralegals, paraprofessionals and other non-lawyers with the training and licensing required to adequately assist underserved and underrepresented communities.

Through harnessing the potential of paralegals and paraprofessionals to take on a wider range of legal responsibilities, the state has a unique opportunity to directly improve how easily low-income families and rural populations access justice.

By acknowledging the instrumental role non-lawyers and other legal professionals can play, the proposed program could help resolve pending family law-based matters in addition to any other pressing legal issues left on the back burner.

Untapped Resources

This bold step to license, train and equip qualified paralegals and paraprofessionals with the skills they need, which has been met by much criticism in other states, may be reflective of a much broader legal shift within the U.S. judicial system.

The proposed move not only recognizes the innate value of this underutilized workforce of paralegals but also seeks to address these longstanding inequalities and challenges in legal services through innovation.

Both regulatory adjustments and legal licensing frameworks for paralegals and other paraprofessionals will need to be carefully reviewed, with the outcome likely initiating a critical difference in narrowing the sizeable justice gap.

By introducing this new law, Texas has the potential to empower paraprofessionals and demonstrate how other states can reinvent their legal systems through alternative service models.

The Path Forward

The Texas Supreme Court is no longer fielding public comments on the proposed bill and amended rules for licensed paraprofessionals and court-access assistants. Without any future legislative setbacks, the bill is expected to go into full effect on Dec. 1, drastically reshaping the legal response to the state's growing aid gap.

Texas currently stands at a critical turning point in addressing longstanding legal challenges and inequities plaguing the family law practice area and many other categories of state law.

By allowing non-lawyers, including paralegals, paraprofessionals or other legally adjacent specialists, to gain additional training, the state can offer underrepresented individuals, families and entire communities an innovative option to meet their specific legal needs.

Despite the potential threat of impending challenges and setbacks in the coming months, the list of benefits for Texans who require legal aid makes this development worth the Supreme Court's full attention.

When all is said and done, this bold legislation could mark the next step forward in closing the justice gap, and a brighter legal future for non-lawyers operating throughout the state.

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Legal Aid Society honors attorneys providing aid to those in need



Patrick McBurney, left, of McBurney Law, was Benton Franklin Legal Aid Society's 2024 Al Yencopal Award winner. Barb Otte-Potter, right, is the nonprofit's executive director.

Courtesy Benton Franklin Legal Aid Society

January 16, 2025

Rachel Visick

Two attorneys were in the spotlight for their pro bono work at the Benton Franklin Legal Aid Society's annual attorney appreciation luncheon. The nonprofit provides free legal aid for those in need, covering family law, debtor issues, bankruptcy, wills, Social Security and immigration. In 2024, Legal Aid received about 4,000 requests for help and provided 1,009 applicants with legal aid assistance.

Washington Supreme Court Justice Sheryl Gordon McCloud spoke at this year's Dec. 13 luncheon, which honored the society's volunteers.

Al Yencopal Award

The Al Yencopal Award is named for the late judge Al Yencopal, who died in 1993. He was a supporter of bringing low- or no-cost legal services to the community, and the award honors an individual for their similar commitment to free services.

This year's honoree was Patrick McBurney Jr. of McBurney Law.

He graduated from Seattle Pacific University with a bachelor's degree in political science in 1988 and received his Juris Doctorate from the University of Idaho's College of Law in 1992.

McBurney opened the Law Office of Patrick McBurney in Pasco in 1995, and the firm is now located in Kennewick. He contracted with the Franklin County District Court from 2003-11 to provide indigent defense services, and he is currently a contractor for Benton County Superior Court, providing indigent defense in child support contempt proceedings.

He has been a Benton County Superior Court public defender in the civil contempt role since 2007.

McBurney has volunteered for Legal Aid and supported its program efforts throughout his entire career, the society said.

Gene Schuster Award

The nonprofit's Gene Schuster Award, named after the late Legal Aid founder, typically honors volunteers early in their careers.

This year's awardee was Alyssa Lindburg, an attorney at Celski Law.



Alyssa Lindburg, left, an attorney with Celski Law, was Benton Franklin Legal Aid Society's 2024 Gene Schuster Award winner. Barb Otte-Potter, right, is the nonprofit's executive director.

| Courtesy Benton Franklin Legal Aid Society

Lindburg began practicing law in 2022 after successfully completing the APR 6 Law Clerk Program, an [alternative to law school](#).

She graduated from Washington State University with a bachelor's degree in history and has a master's degree in military history with a concentration in World War II, which she received with honors from American Public University.

She's provided services in the nonprofit's program clinics and the newly minted Domestic Violence Attorney Program in addition to providing support for the society's fundraising efforts.

Lindburg has stepped up with true leadership in the community to provide access to justice, according to Legal Aid.

Other awards

The Legal Aid event also honored several other volunteers.

Mariah Lujano, Elisa Cantu, Jeremy Bishop, Kolleen Ledgerwood and Rebecca Saitz were recognized for taking more than three cases in 2024 and/or participating in monthly family law clinics.

Mark Von Weber, Legal Aid's part-time limited license legal technician, also was recognized for donating more than 800 hours of his time to the society's program.

Kari Hayles Davenport, Don Schirm and Celski Law were honored for dedicating over 230 hours to the Domestic Violence Attorney Program. Legal Aid launched the program in 2024 to provide victims with a pro bono attorney in court.

Legal Aid also highlighted Pronto Processing Services' dedication. The business provides free services and free delivery of information to the legal community for Legal Aid's program.

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Tri-City legal experts weigh in on state's effort to innovate legal services



The Washington State Supreme Court has authorized a 10-year pilot program to consider innovative models for the public to receive legal services. Tri-City legal experts say there is a need to increase access to justice but that there are potential challenges and pitfalls that need to be taken into account.

File photo

January 16, 2025

Ty Beaver

Imagine instead of consulting a lawyer about filing for divorce, going to a website that details the process, provides the forms and files them with a court once you complete them. Or if you need to revise your estate plan or will, you answer prompts from an artificial intelligence-guided chatbot to determine what steps you need to take.

Such a future may not be that far off in Washington state. The recent decision of the Washington State Supreme Court authorizing a 10-year pilot program that would permit new methods and models of providing legal services in the state could usher in an era where people may not ever need to interact with an attorney in their legal affairs.

“I think inside a courtroom you’re always going to have attorneys,” said Asa LaMusga, an attorney with Gravis Law and president of the Benton-Franklin Bar Association. “But the jury’s out on everything else.”

Attorney shortage

However, others see the effort as another attempt by state-level legal and justice system leaders to fix issues without addressing the primary problem: there aren’t enough attorneys in Washington state, especially outside of the major metropolitan areas, and it’s unclear how technological innovation will be held to the same ethical standards.

“To me, this has an appearance that it’s about money, about creating a new industry for a corporate entity to make money,” said Matthew Purcell of Purcell Family Law in Kennewick. “It has the feeling of us just taking and replacing people with technology, which to me should always be a cautionary approach.”

The state has struggled with a chronic shortage of lawyers for years. That shortage is increasingly visible at the criminal court level, as public defense offices struggle to keep caseloads manageable and county governments face rising costs to ensure the indigent have representation. If caseload limits recommended by the state bar association are implemented by the state Supreme Court, Benton County officials estimate it will cost an additional \$6.6 million to comply.

“Currently the state only covers about 4% of the cost of providing public defense services in Benton County and has not indicated a willingness to increase the amount,” Benton County commissioners said in the introduction to the county’s budget.

But the shortage of lawyers also means there are fewer available and affordable for the public to seek help from on everything from contracts to child custody arrangements, experts said.

“The demand is always greater than the resources we have,” said Barb Otte-Potter, executive director of Benton Franklin Legal Aid Society.

Pilot program

Details and requirements for participation in the court’s pilot program have not yet been released. However, information from the court and the Washington State Bar Association (WSBA) indicate that the effort could lead to non-lawyers providing legal services and that new tech platforms and tools, such as chatbots, could play a role. The state Supreme Court currently only allows individuals it has licensed to own law firms, share legal fees, and practice law in the state.

“A lot has changed in 100 years, but not when it comes to legal regulation,” said WSBA Executive Director Terra Nevitt in a release. “Now we are at a regulatory crossroads. The technology revolution is here, as well as exciting new business models. This pilot will help us understand whether and how we can harness that innovation – with public protection as our top priority – to meaningfully expand legal services for Washingtonians.”

WSBA Entity Regulation Pilot Project Interview



Improving access

This isn’t the first time the state has sought to improve access to legal representation.

The Limited License Legal Technician, or LLLT, program sought to train those without a law degree to provide advice and assistance to people going through divorce, child custody, and other family law matters in Washington state. The program failed to recruit enough participants and also was found to be unsustainable financially. The state Supreme Court sunset the program and the last LLLT certificates were issued in mid-2023.

The LLLT program has been a massive help to Benton Franklin Legal Aid Society, Otte-Potter said, as an LLLT volunteer it works with has essentially doubled the number of hours the nonprofit assists clients.

“It’s like having our own paid attorney on staff,” she said.

However, LaMusga and Purcell said the LLLT program was not successful, as it did not lead to many license holders offering services in areas where they are needed: rural and isolated communities where attorneys are retiring or dying without anyone picking up their practices.

Self-service model

The state’s new pilot program offers an opportunity to make a real change that benefits everyone, LaMusga said, largely because it doesn’t set out a pre-determined model for how services are provided. And he’s already seen how technology can help people navigate the legal system.

“I’ve seen unrepresented people do well in court just by utilizing ChatGPT,” he said.

It is legal services that are primarily form-driven that are the best candidates for new approaches, LaMusga said. A self-service model, such as using a chatbot, could lead to people not having to interact with a legal professional at all.

There are risks to a new model, though. Current licensing standards are in place to maintain accountability and protect the public from receiving poor representation or bad advice, experts said.

“Very few professions require (their) members to swear an oath,” Purcell said, noting that he can be fined or jailed if he serves as a poor advocate for a client.

Purcell said he appreciates technology and sees ways it can help lawyers and clients more efficiently and effectively seek justice. However, there are plenty of cautionary tales about how tech disruptions of established industries have not benefited consumers, he said, and adapting to current everyday technology is still a challenge in many courtrooms.

“I still advocate that clients be allowed to appear virtually in court so they don’t have the increased cost of an in-person appearance,” Purcell said.

Otte-Potter said there’s not enough information about the parameters of the pilot program to know what it could mean for people seeking legal assistance. She noted that the state is already ahead of the game in increasing access to the law, such as through interactive legal forms for some processes.

Benton Franklin Legal Aid Society also has looked for ways to increase its reach. Beyond working closely with an LLLT, Otte-Potter said a recent partnership with the city of Richland through a grant allowed it to establish a domestic violence program to serve victims. The demand for services was higher than anticipated and a grant renewal will allow it to continue.

“If there’s innovative ways to alleviate the pressure on the court, I’m always open to it,” Otte-Potter said. “We just want to make sure we do it right and everyone has access to justice.”

Purcell said the state Supreme Court and WSBA would be better served dedicating their efforts to holistically improving access to justice. Ensuring courtrooms are accessible, making law school more affordable and incentivizing attorneys setting up practice in under-served areas would do more to ensure people can assert and protect their rights.

“I wonder if they could have used the money for this pilot or other pilots to fund or pay for a large number of lawyers and assigned them to an underserved county and said, ‘You are now the WSBA access to justice attorney for this community,’” Purcell said.

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Nonlawyer services: A ‘harbinger of the future’ to close the justice gap?

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While the use of nonlawyers to provide legal advice and representation is not new, the idea is a controversial yet possible solution to help close the access-to-justice gap, according to an expert panel at a Jan. 31 program presented during the American Bar Association Midyear Meeting in Phoenix.

“There’s a lot of opposition within the bar to nonlawyers offering any legal services, especially without the supervision of an attorney,” said Stephen Daniels, an American Bar Foundation research professor emeritus, at the program, “The Age-Old Question Facing All of Us — Deny People Any Help or Allow Some By Nonlawyers: An Innovation’s Odyssey.” Yet, Daniels said, the idea is a “harbinger of the future.”

In 2012, Washington state “let the genie out of the bottle” and authorized a training program for limited licensed legal technicians, known as LLLTs, Daniels said. Other states followed: Arizona, Colorado, Oregon and Utah. Arizona now has more than 100 nonlawyer firms, said panel moderator Don Bivens, chair of the ABA Center for Innovation.

Minnesota has a program that requires attorney supervision of nonlawyers. As many as a dozen other states have or are exploring a program involving nonlawyers of some kind in specific areas, such as family law and criminal law. “It is an experiment. It is evolving,” Daniels said.

While opponents of nonlawyers say these mid-level legal professionals are taking away business from young lawyers in rural America, proponents argue

that nonlawyers are needed to address the problems of affordability, an aging profession, sharply lower law school enrollments and debt and geography and legal deserts.

“Access to justice is a problem that’s never going away, only mitigated,” Daniels said.

Michele Statz, an associate professor at the University of Minnesota Medical School, addressed the rural justice gap, noting that 92% of low-income Americans can’t access the services to address their civil legal needs. Additionally, only 14% of rural individuals receive assistance for their civil legal needs.

Statz pointed to the success of the Alaska Legal Service Corporation’s Community Justice Worker program, which trains local community members to provide legal assistance to Alaskans who would otherwise lack access to civil legal help. The model resembles one also used in the state that allows trained health advocates to provide health care in rural areas.

“There is no silver bullet to provide legal services to everyone,” said Rudy Sanchez, executive director of DNA-People’s Legal Services, a nonprofit law firm that offers legal services to Native Americans in three southwestern states. But in order to help those who cannot afford or access services performed by traditionally licensed attorneys, “we have to be willing to experiment” and train others to provide those services, he said.

Sanchez conceded that the legal profession needs to consider what constitutes the unauthorized practice of law and the services nonlawyers can and cannot provide. When it comes to community justice workers serving as nonlawyers to the population that desperately needs them, Sanchez asked, “Do (the people) get zero services? Or do they get some services?” For people to have access to legal services, “you have to tweak the rules.”

The program was presented by the Fellows of the American Bar Foundation.

Washington State House of Representatives Civil Rights & Judiciary Committee
SJM 8006 Index

In the Senate

January 7	Prefiled for introduction.	
January 13	First reading, referred to Law & Justice.	SJM 8006 Original Bill
January 20	Public hearing in the Senate Committee on Law & Justice at 10:30 AM.	January 20, 2025 Agenda January 18, 2025 Bill Report
January 23	Executive action taken in the Senate Committee on Law & Justice at 10:30 AM. LAW - Majority; do pass. And refer to Ways & Means. Do Pass – Signed by Senators Dhingra, Chair; Trudeau, Vice Chair; Holy, Ranking Member; Fortunato, Lovick, Salomon, Torres, Valdez and Wagoner	January 23, 2025 Agenda January 20, 2025 Bill Report
January 24	On motion, referred to Rules Committee for second reading.	
January 29	Placed on second reading by Rules Committee.	
February 5	Rules suspended. Placed on Third Reading. Third reading, passed; yeas, 49; nays, 0; absent, 0; excused, 0.	

In the House

February 7	First reading, referred to Civil Rights & Judiciary.	
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March 14	Public hearing in the House Committee on Civil Rights & Judiciary at 10:30 AM.	March 14, 2025 Agenda March 14, 2025 Bill Analysis
March 19	Executive action taken in the House Committee on Civil Rights & Judiciary at 8:00 AM. CRJ – Majority; do pass Do Pass – Signed by Representatives Taylor, Chair; Farivar, Vice Chair; Walsh, Ranking Minority Member; Burnett, Entenman, Jacobsen, Peterson, Salahuddin, Thai, and Walen Minority; do not pass Signed by Representatives Abell, Assistant Ranking Minority Member; Goodman, and Graham.	March 19, 2025 Agenda March 14, 2025 Bill Analysis
March 20	Referred to Rules 2 Review.	

SENATE JOINT MEMORIAL 8006

State of Washington

69th Legislature

2025 Regular Session

By Senators Torres and Hasegawa

Prefiled 01/07/25. Read first time 01/13/25. Referred to Committee on Law & Justice.

1 TO THE HONORABLE CHIEF JUSTICE AND MEMBERS OF THE WASHINGTON
2 STATE SUPREME COURT:

3 We, your Memorialists, the Senate and House of Representatives of
4 the State of Washington, in legislative session assembled,
5 respectfully represent and petition as follows:

6 WHEREAS, There is currently a noted shortage of attorneys
7 available to fill roles in public defense and prosecution in
8 Washington state, as confirmed by Legislative testimony in numerous
9 hearings, constituent appeals, and as widely reported in the press
10 throughout 2024; and

11 WHEREAS, The shortage of available attorneys is felt in many
12 other areas by low and moderate-income Washingtonians, as confirmed
13 by the Civil Legal Needs Studies from 2003 and 2015, which found that
14 these Washingtonians frequently cannot access or afford legal
15 services; and

16 WHEREAS, Experience in Washington State proves that a portion of
17 this access problem can be ameliorated safely and with adequate
18 client protections and controls by creation of opportunities for
19 expansion of the authorized practice of law; and

20 WHEREAS, Beginning in 2012, this Court established a limited
21 license legal technician program in Washington State to authorize
22 certain persons to render limited legal assistance or advice in
23 approved practice areas of law, and saw the first class of limited

1 license legal technician candidates graduate in 2014 with new limited
2 license legal technicians continuing to be eligible for licensure
3 until 2023, provided the candidates had started their educational
4 requirements by June 4, 2020; and

5 WHEREAS, A study by the Public Welfare Foundation in 2017 found
6 that limited license legal technicians in Washington provide
7 significant help in creating access to justice; and

8 WHEREAS, Studies by groups such as the Stanford Center on the
9 Legal Profession, Arkansas Law Review, and ABA Standing Committee on
10 Paralegals have written favorable analyses on Washington State's
11 first in the nation limited license legal technician program, noting
12 that it has served as a model inspiring similar programs in states
13 such as Arizona, Minnesota, Oregon, and Utah; and

14 WHEREAS, In April and June of 2020, the limited license legal
15 technician board submitted reports to the Court describing the
16 successes experienced by the program and requesting its continuance
17 and expansion to the new practice areas of administrative law and
18 eviction and debt assistance; and

19 WHEREAS, The Court's decision to instead sunset the limited
20 license legal technician program, issued on June 5, 2020, over a
21 vigorous dissent by Justice Madsen, did not anticipate the acuity of
22 the current crisis in legal representation for low and moderate-
23 income Washingtonians;

24 NOW, THEREFORE, Your Memorialists respectfully ask the Chief
25 Justice and members of the Court to:

26 (1) Reverse the sunset of the limited license legal technician
27 program and reinstate issuance of new licenses to qualified
28 candidates;

29 (2) Expand the limited license legal technician program within
30 one year to include authorization for a properly trained limited
31 license legal technician to provide assistance to clients at
32 administrative hearings and to provide eviction and debt assistance,
33 consonant with the 2020 recommendations of the limited license legal
34 technician board; and

35 (3) Form a work group to consider how limited license legal
36 technicians can be used to help meet the needs of individuals charged
37 with offenses in courts of limited jurisdiction, and to instruct that
38 work group to deliver recommendations for expansion of the program
39 into this area within two years.

1 BE IT RESOLVED, That copies of this Memorial be immediately
2 transmitted to the Honorable Chief Justice and members of the
3 Washington State Supreme Court.

--- END ---

SENATE BILL REPORT

SJM 8006

As of January 18, 2025

Brief Description: Concerning the limited license legal technician program.

Sponsors: Senators Torres and Hasegawa.

Brief History:

Committee Activity: Law & Justice: 1/20/25.

Brief Summary of Bill

- Asks the Washington State Supreme Court (Court) to reinstate the Limited License Legal Technician (LLLT) program, sunsetted in 2020.
- Asks the Court to expand the LLLT program into the new areas of providing assistance at administrative hearings, and debt collection and eviction proceedings.
- Asks the Court to form a work group to study and recommend how LLLTs could help defendants in courts of limited jurisdiction.

SENATE COMMITTEE ON LAW & JUSTICE

Staff: Kevin Black (786-7747)

Background: Authorized Practice of Law. General Rule 29, promulgated by the Washington State Supreme Court (Court), defines the practice of law as the application of legal principles and judgment to circumstances which require the knowledge and skill of a person trained in law. It is illegal for a person who is not licensed as a lawyer in Washington State to practice law within Washington outside of federal court unless they qualify through a number of exceptions, which include practicing as a courthouse facilitator, lay representative, mediator, arbitrator, conciliator, or practicing through a limited license. Limited license opportunities in Washington include those for licensed legal interns, limited practice officers, foreign law consultants, and limited license legal technicians (LLLTs).

This analysis was prepared by non-partisan legislative staff for the use of legislative members in their deliberations. This analysis is not part of the legislation nor does it constitute a statement of legislative intent.

Limited License Legal Technicians. The LLLT program, established by order of the Court in 2013, allows nonlawyers licensed as LLLTs to render limited legal assistance as specified by court rule. The scope of the LLLT includes:

- obtaining relevant facts, and explaining their relevancy;
- informing clients of applicable procedures;
- informing clients with services of process and filing of legal documents;
- providing the client with self-help materials;
- reviewing documents and exhibits received by the client and explaining them;
- performing legal research and assisting a client with obtaining necessary records;
- drafting letters or certain legal documents if they are subsequently reviewed by a Washington lawyer;
- communicating and negotiating with the opposing party regarding procedural matters; and
- accompanying and assisting the client in dispute resolution proceedings.

The scope of an LLLT is further limited to domestic proceedings. An LLLT must inform a client when issues arise beyond their authorized scope of practice.

A LLLT must have completed 45 credit hours of coursework related to the legal profession, 15 credit hours of instruction in the LLLT's intended area of practice, 1500 hours of substantive law-related work experience, and passed an examination.

On April 22, 2020, the LLLT board submitted an annual report to the Court and requested expansion of the scope of LLLT practice to include providing assistance to clients at administrative hearings and to provide eviction and debt assistance. On June 5, 2020, the Court voted to sunset the LLLT program and close it to new applicants not already in the pipeline. The deadline to become licensed for those in the pipeline was extended twice until July 31, 2023, and has expired. LLLTs in good standing are permitted to continue to be licensed and to provide services. As of January 6, 2025, there are 73 persons with an active LLLT license.

Summary of Bill: The Chief Justice and members of the Court are requested to:

- reverse the sunset of the LLLT program and reinstate the issuance of new licenses;
- expand the LLLT program within one year to include authorization to provide assistance to clients at administrative hearings and to provide eviction and debt assistance; and
- form a work group to consider how LLLTs can be used to help meet the needs of individuals charged with offenses in courts of limited jurisdiction and within two years deliver recommendations for expansion of the LLLT program into this area.

Appropriation: None.

Fiscal Note: Requested on January 10, 2025.

Creates Committee/Commission/Task Force that includes Legislative members: No.

Effective Date: Ninety days after adjournment of session in which bill is passed.

SENATE BILL REPORT

SJM 8006

As of January 20, 2025

Brief Description: Concerning the limited license legal technician program.

Sponsors: Senators Torres and Hasegawa.

Brief History:

Committee Activity: Law & Justice: 1/20/25.

Brief Summary of Bill

- Asks the Washington State Supreme Court (Court) to reinstate the Limited License Legal Technician (LLLT) program, sunsetted in 2020.
- Asks the Court to expand the LLLT program into the new areas of providing assistance at administrative hearings, and debt collection and eviction proceedings.
- Asks the Court to form a work group to study and recommend how LLLTs could help defendants in courts of limited jurisdiction.

SENATE COMMITTEE ON LAW & JUSTICE

Staff: Kevin Black (786-7747)

Background: Authorized Practice of Law. General Rule 29, promulgated by the Washington State Supreme Court (Court), defines the practice of law as the application of legal principles and judgment to circumstances which require the knowledge and skill of a person trained in law. It is illegal for a person who is not licensed as a lawyer in Washington State to practice law within Washington outside of federal court unless they qualify through a number of exceptions, which include practicing as a courthouse facilitator, lay representative, mediator, arbitrator, conciliator, or practicing through a limited license. Limited license opportunities in Washington include those for licensed legal interns, limited practice officers, foreign law consultants, and limited license legal technicians (LLLTs).

This analysis was prepared by non-partisan legislative staff for the use of legislative members in their deliberations. This analysis is not part of the legislation nor does it constitute a statement of legislative intent.

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- obtaining relevant facts, and explaining their relevancy;
- informing clients of applicable procedures;
- informing clients with services of process and filing of legal documents;
- providing the client with self-help materials;
- reviewing documents and exhibits received by the client and explaining them;
- performing legal research and assisting a client with obtaining necessary records;
- drafting letters or certain legal documents if they are subsequently reviewed by a Washington lawyer;
- communicating and negotiating with the opposing party regarding procedural matters; and
- accompanying and assisting the client in dispute resolution proceedings.

The scope of an LLLT is further limited to domestic proceedings. An LLLT must inform a client when issues arise beyond their authorized scope of practice.

A LLLT must have completed 45 credit hours of coursework related to the legal profession, 15 credit hours of instruction in the LLLT's intended area of practice, 1500 hours of substantive law-related work experience, and passed an examination.

On April 22, 2020, the LLLT board submitted an annual report to the Court and requested expansion of the scope of LLLT practice to include providing assistance to clients at administrative hearings and to provide eviction and debt assistance. On June 5, 2020, the Court voted to sunset the LLLT program and close it to new applicants not already in the pipeline. The deadline to become licensed for those in the pipeline was extended twice until July 31, 2023, and has expired. LLLTs in good standing are permitted to continue to be licensed and to provide services. As of January 6, 2025, there are 73 persons with an active LLLT license.

Summary of Bill: The Chief Justice and members of the Court are requested to:

- reverse the sunset of the LLLT program and reinstate the issuance of new licenses;
- expand the LLLT program within one year to include authorization to provide assistance to clients at administrative hearings and to provide eviction and debt assistance; and
- form a work group to consider how LLLTs can be used to help meet the needs of individuals charged with offenses in courts of limited jurisdiction and within two years deliver recommendations for expansion of the LLLT program into this area.

Appropriation: None.

Fiscal Note: Requested on January 10, 2025.

Creates Committee/Commission/Task Force that includes Legislative members: No.

Effective Date: Ninety days after adjournment of session in which bill is passed.

Staff Summary of Public Testimony: PRO: This came up in work we are doing related to the public defense shortage. Reviving LLLTs would be a great help. Lack of public services and support staff is the biggest bottleneck in our court system. It undermines public confidence in our ability to keep the community safe. LLLTs are another tool in the toolbox to reduce the lawyer shortage. People who can't afford an attorney are desperate for legal help. LLLTs could be licensed in other areas. Most LLLTs are capable of becoming lawyers but have other obstacles or disabilities. Washington used to lead, now other states are passing us up. When I divorced my abusive husband, I had no money and was overwhelmed. Pro se parties don't understand court rules or procedures, and can be easily exploited. We should do everything to assist where we can. LLLTs make a huge impact in people's lives. Tens of thousands of people need help from only 73 LLLTs. People find LLLTs when they are in desperation and need.

OTHER: In response to the persistent gap in legal services for low income people, Washington was the first state in the nation to create a program of this kind. LLLTs were never intended to replace lawyers. The scope of LLLT practice is much narrower than a lawyer. LLLTs can't file appeals or represent clients in court. The education and experience requirements for LLLTs are extensive, which protects the public. LLLTs offer unbundled legal services and engage in pro bono work. Their clients are mostly below 400 percent of the federal poverty level. Several other states have adopted or are considering adopting LLLT programs.

Persons Testifying: PRO: Senator Nikki Torres, Prime Sponsor; Ranae York, Miryam Gordon, Christine Camper, LLLTs; LaDon Linde, Yakima County Commissioner.

OTHER: Renata de Carvalho Garcia, Terra Nevitt, Washington State Bar Association.

Persons Signed In To Testify But Not Testifying: No one.

Civil Rights & Judiciary Committee

SJM 8006

Brief Description: Concerning the limited license legal technician program.

Sponsors: Senators Torres and Hasegawa.

Brief Summary of Joint Memorial

- Asks the Washington State Supreme Court (Court) to reinstate the Limited License Legal Technician (LLLT) program.
- Asks the Court to expand the LLLT program into the new areas of providing assistance at administrative hearings, and debt collection and eviction proceedings.
- Asks the Court to form a work group to study and recommend how LLLTs could help defendants in courts of limited jurisdiction.

Hearing Date: 3/14/25

Staff: Matt Sterling (786-7289).

Background:

Authorized Practice of Law.

General Rule 24, adopted by the Washington State Supreme Court (Court), defines the practice of law as the application of legal principles and judgment to circumstances which require the knowledge and skill of a person trained in law. It is illegal for a person who is not licensed as a lawyer in Washington to practice law within Washington outside of federal court unless they qualify through a number of exceptions, which include practicing as a courthouse facilitator, lay representative, mediator, arbitrator, conciliator, or practicing through a limited license. Limited license opportunities in Washington include those for pro bono admission, limited admissions, licensed legal interns, limited practice officers, foreign law consultants, and limited license legal

This analysis was prepared by non-partisan legislative staff for the use of legislative members in their deliberations. This analysis is not part of the legislation nor does it constitute a statement of legislative intent.

technicians (LLLTs).

Limited License Legal Technicians.

The LLLT program, established in Admissions and Practice Rule 28, allows nonlawyers licensed as LLLTs to render limited legal assistance as specified by court rule. The scope of the LLLT includes:

- obtaining relevant facts, and explaining their relevancy;
- informing clients of applicable procedures, documents, and the anticipated course of the legal proceeding;
- assisting with services of process and filing of legal documents;
- providing the client with self-help materials that contain information about relevant legal requirements;
- reviewing documents and exhibits received by the client and explaining them;
- effecting service of certain state forms or those prepared by a Washington lawyer;
- performing legal research and assisting a client with obtaining necessary records;
- drafting letters or certain legal documents if they are subsequently reviewed by a Washington lawyer;
- advising the client as to other documents that may be necessary to the client's case;
- communicating and negotiating with the opposing party regarding procedural matters; and
- accompanying and assisting the client in dispute resolution proceedings.

The rule provides the conditions under which an LLLT may provide services, prohibited acts for an LLLT, continuing license requirements, and the applicability of professional responsibility requirements.

On June 4, 2020, the Court decided to sunset the LLLT program. The Court extended the deadline for LLLT applicants to complete the preadmission requirements to July 31, 2023, after which no new LLLT licenses may be issued.

Summary of Bill:

The Chief Justice and members of the Court are requested to:

- reverse the sunset of the LLLT program and reinstate the issuance of new licenses;
- expand the LLLT program within one year to include authorization to provide assistance to clients at administrative hearings and to provide eviction and debt assistance; and
- form a work group to consider how LLLTs can be used to help meet the needs of individuals charged with offenses in courts of limited jurisdiction and within two years deliver recommendations for expansion of the LLLT program into this area.

Appropriation: None.

Fiscal Note: Not requested.

[Reports Home](#) | [Bill History](#) | [Bill Tracking](#) | [Docs](#) | [Bills By Citation](#) | [Bill Sponsors](#) | [Bills In/Out of Committee](#) | [Roll Calls](#) | [Topical Index](#) | [Selected Step](#) | [Member Directory](#)

SJM 8006 - 2025-26

Concerning the limited license legal technician program.

Sponsors: **Torres**, **Hasegawa**

Bill History

2025 REGULAR SESSION

IN THE SENATE

- Jan 7 Prefiled for introduction.
- Jan 13 First reading, referred to Law & Justice.
- Jan 20 Public hearing in the Senate Committee on Law & Justice at 10:30 AM.
- Jan 23 Scheduled for executive session in the Senate Committee on Law & Justice at 10:30 AM (Subject to change).

ASSESSING ARIZONA'S LEGAL
PARAPROFESSIONALS:

2024 PROGRAM SURVEY



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Introduction

On August 27, 2020, by unanimous vote, the Arizona Supreme Court adopted several changes to the regulation of the practice of law. These changes, recommended by the [2019 Task Force on the Delivery of Legal Services](#), were adopted as additions to the Arizona Code of Judicial Administration (ACJA) by the Arizona Judicial Council (AJC) on October 22, 2020. One of the ten recommendations of the Task Force adopted by the Supreme Court and the AJC was the development of a licensed Legal Paraprofessional program. These licensed, non-attorney, legal-practitioners would be able to provide legal services as defined in the ACJA in four practice areas: Civil Law, Family Law, Criminal Law, and Administrative Law. Juvenile Dependency Law was added to the list of practice areas in 2024.

Starting in 2021, the Administrative Office of the Courts' (AOC) Certification and Licensing Division issued ten Legal licenses. The program has grown incrementally and, as

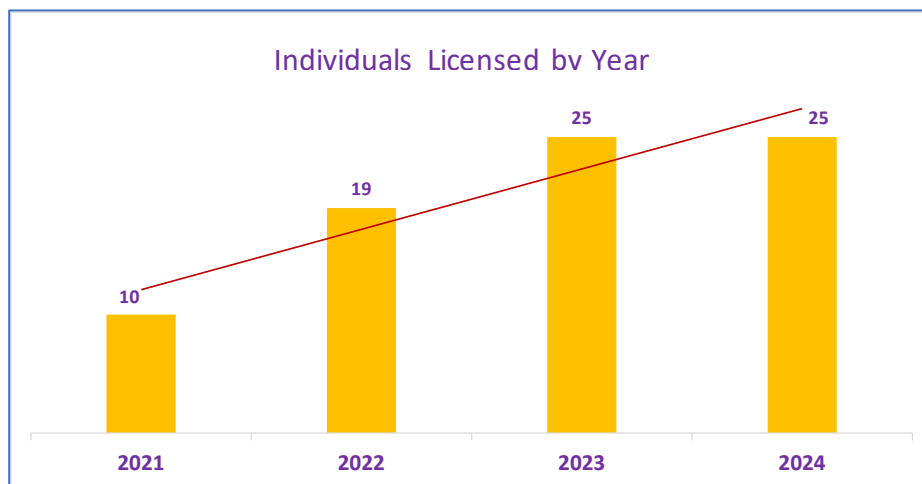


Figure 1 – Individuals Licensed by Year

of this publication, has issued 79 licenses.¹ LPs can be licensed in more than one practice area.

¹ Administrative Office of the Courts. (2025). (rep.). *Board of Nonlawyer Legal Service Professionals 2024 Annual Report to the Arizona Supreme Court* (p. 10). Phoenix, AZ.

The Task Force further recommended the development of methods for measuring the “appropriateness, effectiveness, and sustainability” of the LP program.² To date, no process has been implemented to gather data on these three measurements. In late 2024, building on questions and formats from other court offices,

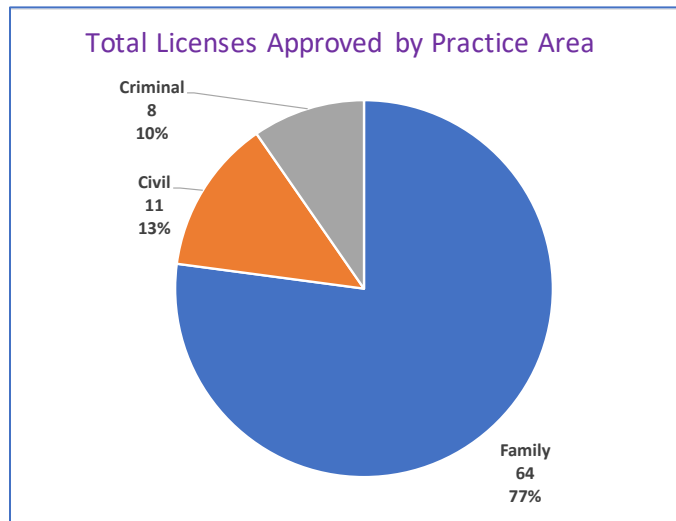


Figure 2—Total Licenses Approved by Practice Area (as of December 2024)

including Minnesota and Ontario, Canada, the AOC’s Certification and Licensing Division (CLD) conducted the survey that resulted in this report.

A full version of this report is available that includes Appendices reflecting the survey questions and responses.

Methods

CLD staff determined it was important to gather qualitative and quantitative data regarding the program and how well it is contributing to the overarching goal of improving access to justice. The process started with an internal discussion of what was known and unknown. While CLD heard anecdotally from judicial officers, LPs, or Arizona’s law schools on how the program was working, it was quickly clear that some of the many unknowns included:

² Arizona Supreme Court. (2019). (rep). *Task Force on the Delivery of Legal Services: Report and Recommendations*. Phoenix, AZ.

- client demographics,
- the locations and types of LP practices across the state,
- costs and fees associated with LP services,
- the types of cases being represented and how they were resolved,
- the levels of courts where cases were heard, and
- the overall impressions of LPs, attorneys, clients, and judicial officers.

Similar concerns have been heard in other states. Angie Arkin, an attorney who helped develop Colorado's Licensed Legal Paraprofessional (LLP) program says the overall reception has been positive but,

It's like when nurse practitioners started and when physician assistants started, no one really knew what they were. It's a new licensure, a new role. And not only is the public largely unaware of their existence, but judges, lawyers and LLPs themselves are trying to figure out and navigate the meaning of the rules and what the space is that the LLPs can practice in.³

For Arizona's data collection, three surveys were developed, one each for LPs, judicial officers, and attorneys. A fourth survey was developed for clients along with a letter from CLD explaining the purpose of the survey and that no personally identifiable or case information would be gathered. LPs were asked to send the survey link via email to their clients. To the extent names were included in the comments, those names were redacted from the survey responses, published separately. Results were compiled directly via Microsoft Forms at CLD.

³ Bradbury, S. (2024, December 1). Non-attorneys get their day in family court to help clients. *The Denver Post*. Retrieved December 3, 2024, from <https://www.denverpost.com/2024/12/03/colorado-licensed-legal-paraprofessionals-llp-family-law/>.

Client Information

The Client survey consisted of seventeen questions, which included seven optional demographics question. Thirty-four clients responded. It is not known how many received the initial survey invitation or how many clients have been represented by a LP since 2021.

Of the thirty-four who responded, more than 75% were white females aged 25-54.⁴ Most (81%) were employed full time and 50% reported at least some college or a bachelor's degree. The highest response for annual income was \$39,000-\$59,000 (28%) with the next highest response of 22% preferring not to say. As expected, most respondents reside in Maricopa County (53%) with Yavapai, Pima, Mohave, and Santa Cruz Counties, respectively, completing the list.

Attorney Information

CLD asked the State Bar of Arizona, the Maricopa County Bar Association, and the Pima County Bar Association to assist with distributing a survey link to their membership. CLD does not have access to a list of active licensed attorneys in Arizona but these organizations published weekly e-newsletters and readily agreed to share the link several times. A link to the survey was also posted on the CLD website.

The Attorney survey consisted of twelve questions, which included one net promoter score and various questions regarding their observations and impressions of the program. Thirty-eight attorneys responded.

Forty-four percent of respondents indicated they were aware of the program either by reading or hearing about it. Only 15% indicated serving as opposing counsel on a case and 9% said they worked with a LP in their law firm. This shows the legal community is getting

⁴ Ages 25-34=28%, 35-44=22%, and 45-54 = 38% of client responses

information on the program. Additionally, as the LP data will show, most cases involving a LP are settled before trial and this supports the low number of respondents who have interacted with a LP in court. However, as the survey was open to all attorneys and most LPs indicate they work within a law firm, it is not surprising that few attorneys indicated working with the proportionally small number of LPs.

As with the client responses, Maricopa, Pima, and Pinal counties demonstrated the highest attorney response rate with a combined 68%. The remaining were evenly distributed across the state with no representation from Graham, Greenlee, and La Paz counties. Arizona's vast geography helps illustrate the concern about its legal deserts. Coconino County is the second

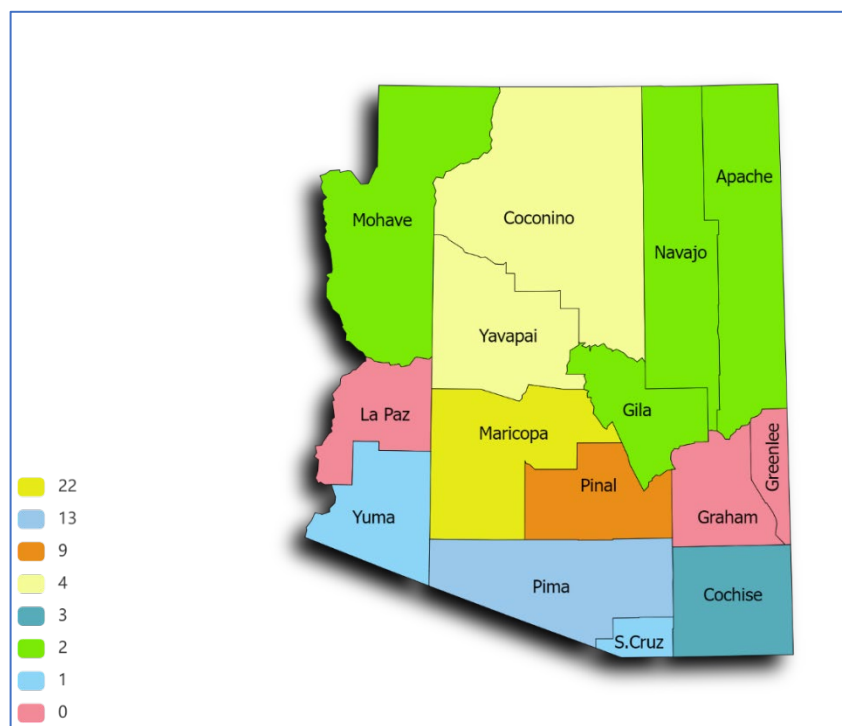


Figure 3 -- Attorney Response Rate Percentage by County

largest county in the United States by land area with Maricopa County ranking fourth largest by population. The state's population centers, and hence the majority of its attorney and LP representation, are located in Maricopa and Pima counties, with the remainder of the state generally sparsely populated.

The attorneys that responded interacted with LPs most often in dissolution cases (25%), followed by child support (19%), and other family law cases (16%). 5% listed “Other” which included assisting with the completion or submission of paperwork.

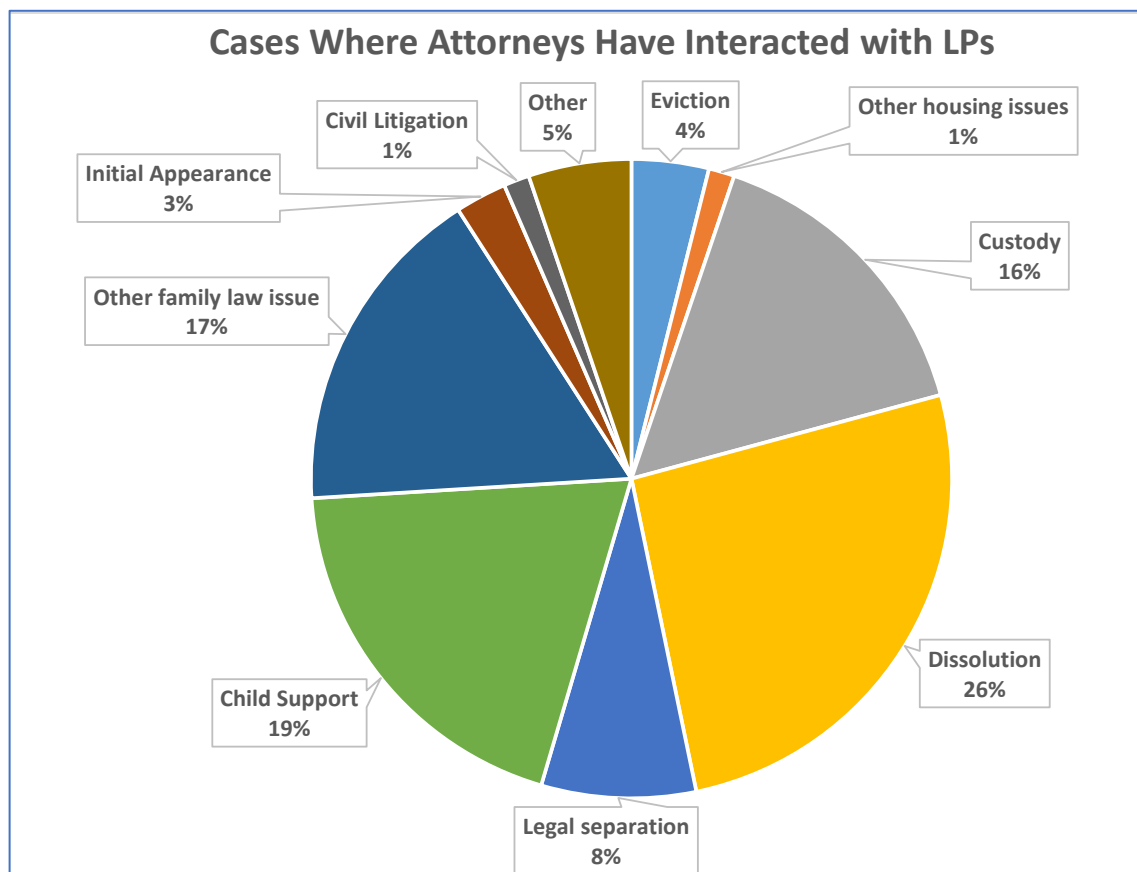


Figure 4 -- Cases Where Attorneys Have Interacted With LPs

Judicial Officer Information

CLD invited 475 judges, justices of the peace, and city magistrates to complete the judicial officer survey. A link to the survey was also posted on the CLD website. CLD received 180 responses; a rate of 38%. Most judges (69%) were from superior courts, 21% responded from

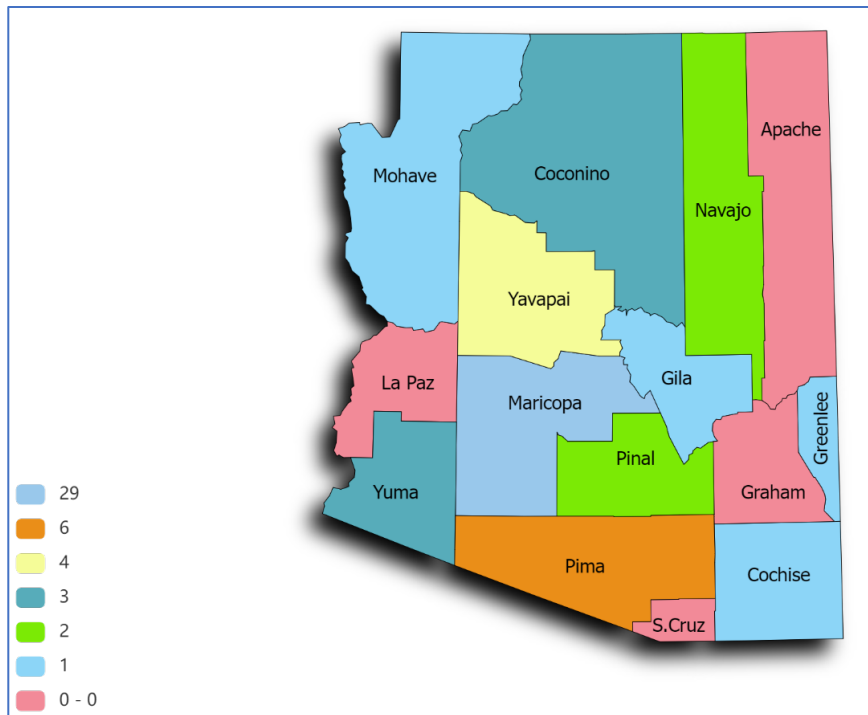


Figure 5 -- Judicial Officer Response Rate Percentage by County

municipal courts, and the remaining 10% represented limited jurisdiction or justice of the peace courts. Maricopa County judges represented the most responses (55%), and no responses were received from Apache, Graham, La Paz, or Santa Cruz counties.

The Judicial Officer survey consisted of thirteen questions, which included one net promoter score and various questions regarding their observations and impressions of the program. Twenty-three percent of respondents indicated seeing a LP appear before them for a case. This represents 9% of all possible judicial officers in the state. This low number is also expected as LPs indicated on their survey that over 70% of their cases settle.

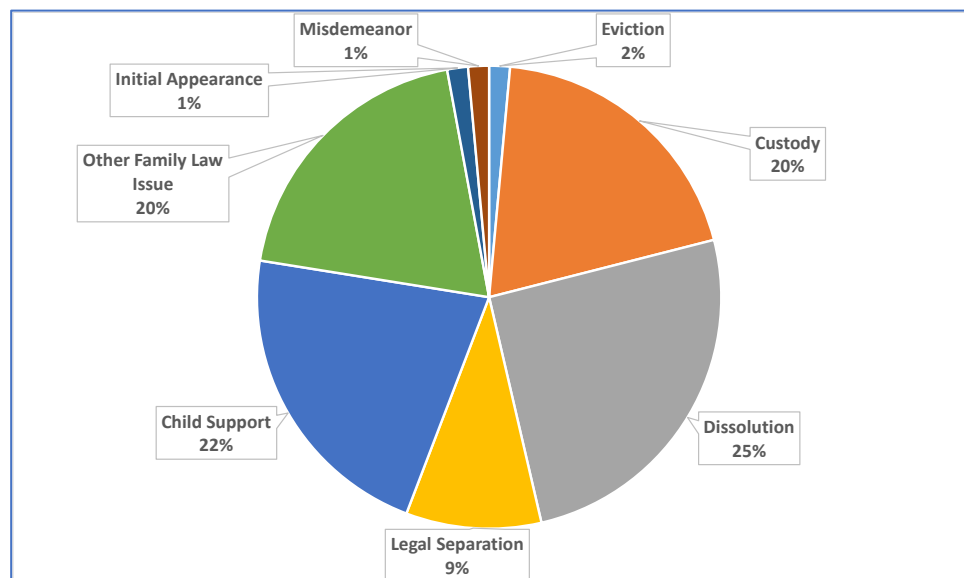


Figure 6 -- LP Represented Cases in Arizona Courts

Like the attorney responses, judges are seeing LPs mostly handle dissolution cases (25%), followed by child support (22%), and other family law cases (20%).

Legal Paraprofessional Information

When the survey was created in October 2024, there were 72 licensed Legal Paraprofessionals. After LPs are approved for licensure, the State Bar of Arizona issues license numbers and monitors LPs' licensure and discipline status. As of December 11, 2024, there were 79 licensed LPs.

CLD emailed a survey link to the 66 then-active LPs in October and received 47 responses (71%). A link to the survey was also posted on the CLD website.

The LP survey consisted of 53 questions, which included one net promoter score and various questions regarding their client demographics, their caseload, rates and fees charged,

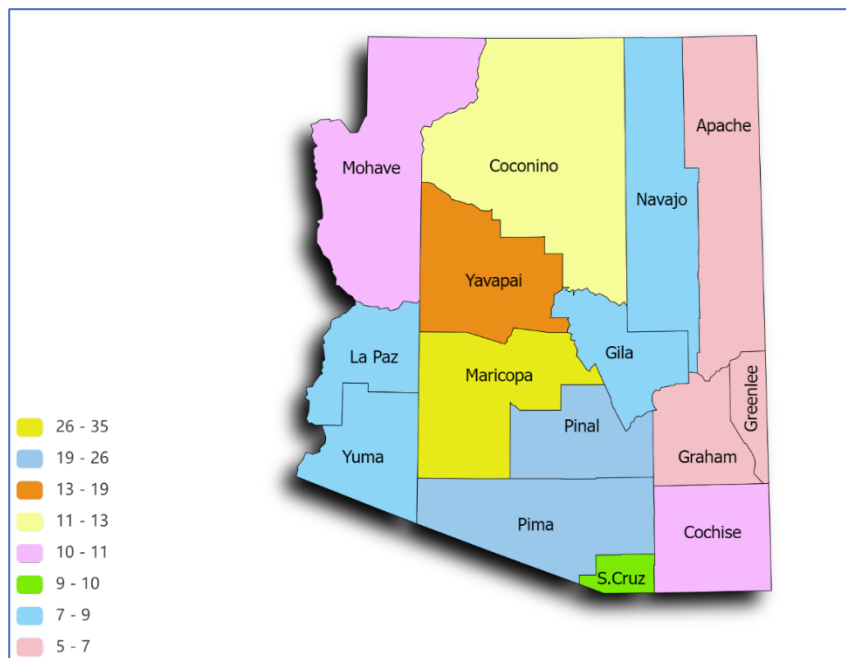


Figure 7 -- LP Availability by County

training opportunities and various observations and impressions of the program and the profession. LPs were asked questions regarding CLD's exam and application processes and about the Division's customer service and communication.

While their clients generally are located in the

main population centers of the Phoenix and Tucson metro areas, LPs indicate availability across the state and may be more accessible than private practice attorneys.

Legal Paraprofessionals in Practice: What Do We Know?

Experience, Education, and Knowledge of the Program

Arizona licenses its LPs through one of two tracks: Education or Experience. 68% were approved based on experience which requires the completion of seven years of full-time, substantive, law-related experience in each practice area, within the ten years prior to applying for licensure.⁵ Many LPs have prior experience as a paralegal or Legal Document Preparer.

	HS Only	Paralegal Certificate	Associate with Paralegal	Other Associate	Bachelor of Law	Other Bachelor	Master of Legal Studies	Other Masters	JD	EdD/ PhD
■ Arizona State University						1	4		1	
■ Everest College						1				
■ Lamson College			1							
■ Hamline School of Law									1	
■ Phoenix College			2							
■ Pima Community College		2								
■ Summit Law									1	
■ University of Arizona							4		1	1
■ Other	3	1	5	1		10		1		

Table 1 -- Degrees by Institution

For all LPs, fifty-six percent of all LPs attended either Arizona State University or the University of Arizona, 20% attended a community college in Arizona, and the remaining 24% have degrees from other institutions. The type of degree varies widely. An Associate's degree in

⁵ Arizona Code of Judicial Administration, [§§ 7-210\(E\)\(6\)\(f\) and 7-210\(E\)\(7\)](#)

combination with a Paralegal Certificate, and a Master of Legal Studies each individually represent 19%. Additionally, 31% have a Bachelor's degree that was not law-related.

LPs learned about the licensure in a variety of ways: 27% were referred by colleagues and 24% were referred by their employer. 18% saw the information on the AZ Courts website and 14% discovered the profession through their university or paralegal training. One LP said, "I managed my attorney's emails and saw an email come through about the possibility of the license."

Caseloads and Work Locations

When asked about their current work situation, 69% of LPs are part of law firms with 2-50 attorneys or other LPs. Twenty-two percent said they owned their own private practice, with the remainder serving in the Office of the Public Defender or another government agency. While not required, 77% of LPs carry liability or malpractice insurance between \$100,000 and \$3 million. For the majority of LPs, the insurance is carried by their firm (67%).

Clients are finding LPs in a variety of ways including referrals from attorneys (29%) or from other LPs (20%), and social media advertising (11%). Clients reported positive and continual communication with their LP, as 95% were in daily or at least weekly contact with them.

Most of the work provided by LPs is legal advice (30%), representation in court (27%), and document preparation (20%). Colorado's Subcommittee on Paraprofessionals and Legal Services suggested in 2021 that this level of work has a positive impact for clients:

Even basic legal advice and completion and filing of standard pleadings could be significantly helpful to litigants, court staff, judges, and even opposing counsel. Assistance in mediation also could help parties save time and legal costs.⁶

Access to Justice: Are LPs Greening the Desert?

Much has been written about the mounting issue of access to justice for many Americans. The concept of legal deserts, where there is reportedly one lawyer (or less) for every 1,000 residents, is receiving increased scrutiny. A 2017 study by the Legal Services Corporation indicated low income Americans received inadequate or no legal help for 86% of their civil legal problems.⁷ The American Bar Association ranks Arizona 49th on its quantity and distribution of attorneys.⁸ As a relative newcomer to the practice of law, LPs and other Allied Legal Professionals, as they are referred to collectively by organizations like the Institute for the Advancement of the American Legal System (IAALS), are often compared to Nurse Practitioners (NP) and Physician Assistants (PA) in the medical profession. Nurse Practitioners are highly trained medical professionals with limited scope of practice whose profession was created to fill in for a shortage of pediatric doctors and have since provided a low-cost, accessible alternative to seeing a physician for routine care. A report from the Josiah Macy, Jr Foundation says,

⁶ Paraprofessionals and Legal Services Subcommittee. (2021). (rep.). *Preliminary Report Outlining Proposed Components of Program for Licensed Legal Paraprofessionals*. Denver, CO: Colorado Supreme Court.

⁷ Legal Serv. Corp., The Justice Gap: Measuring the Unmet Civil Legal Needs of Low-Income Americans 6 (2017).

⁸ American Bar Association. (2020). (issue brief). *Profile of the Legal Profession*. Retrieved January 3, 2025, from <https://www.americanbar.org/content/dam/aba/administrative/news/2020/07/potlp2020.pdf>.

Nurse practitioners have been providing primary care for over 45 years, and there is strong evidence that this care is cost effective, of high quality, and of great service in increasing access to care for vulnerable populations.⁹

Even though NPs, PAs, and other medical professionals are now the accepted norm in medical facilities across the nation providing greater access to care at lower cost, LPs are facing tougher scrutiny from the legal community and not everyone has fully accepted them. Objections included reference to LPs' hourly rates.

While it is true, according to the survey data that LPs charge on average \$225 an hour or more, it is also true that those rates are often set by the law firm employing the LP and that attorneys in many cases charge more than \$400 per hour. LPs note that many have years of subject matter expertise before licensure and are well educated with many having Masters degrees or higher. This report will later present the competence exam and application process designed to protect the public and ensure that LPs work within their scopes of practice.

One Superior Court Judge offered this positive comment,

- ❖ Opening up a path to representation for nonlawyers is making extremely quality representation available. Various persons with vast legal experience and understanding are now permitted to give the advice and appear in court after years of working in legal professions. Allowing nonlawyers to work within a legal arena they are qualified in is a huge benefit to the areas that are lacking in lawyers.

Arizona's LPs report serving a range of 1-190 clients each since becoming licensed. The average LP has represented at least 44 clients. This is an estimated 3,000 total clients since the program's inception. Approximately 48% of all clients would have been self-represented and 70%

⁹ Pohl, J. M., Hanson, C. M., & Newland, J. A. (2010). "Who Will Provide Primary Care and How Will They Be Trained?" (pp. 167–214). Durham, NC; Josiah Macy, Jr. Foundation.

of all cases were resolved through settlement. This represents a significant benefit to LPs' clients and efficiencies for court calendars. This assessment is further supported by 58% of judges and 59% of attorneys agreeing that hearings with a LP take less time than hearings with self-represented litigants. Unfortunately, 65-67% of both groups also suggest LPs take longer in hearings than an attorney. Courtroom advocacy training may benefit LPs and is addressed later in this report.

Despite areas for improvement, 81% of clients indicate satisfaction with the resolution of their LP-handled case. The other 19% indicated their case was still progressing.

Costs Associated with Legal Services

One of the arguments presented is that LPs charge the same rate as attorneys and are therefore no assistance to low-income individuals and others without access to legal services. The data shows this may be both incorrect and contrary to public opinion.

In 2020, the Arizona Supreme Court surveyed the general public as the LP program was being designed. Sixty-two percent agreed "the costs of hiring a lawyer in Arizona are too high (and) we need to find ways to make legal assistance more affordable" and 58% believed "most people living in poverty and the majority of moderate-income individuals do not receive the legal help they need."¹⁰ In the 2024 survey, more than 96% of LPs agreed the costs of hiring a lawyer are too high and that a majority of moderate-income individuals do not receive needed legal

¹⁰ Arizona Supreme Court, Task Force on the Delivery of Legal Services: *State of Arizona Public Opinion Survey* (2020). Phoenix, AZ.

assistance. These may be statistical reasons why LPs choose to get licensed. Clients were not asked these questions on this survey, an oversight to be corrected on future surveys,

Most LPs (74%) charge by the hour for their services. Thirteen percent charge a flat fee. The remaining 13% indicate providing pro bono services or that they work as part of a government agency or an indigent defense service. One LP said, “Most of my work in personal injury is contingency based.” The average hourly rate was \$239 and flat fees ranged from \$600 to \$3000, depending on the service provided. The average hourly rate for an Arizona attorney in 2023 was \$266, not including retainer or subscription fees.¹¹ While these fees seem comparable, LPs are licensed to practice in matters that may be resolved more quickly, resulting in fewer billable hours. According to Indeed.com, the average annual salary for an attorney in Arizona is \$107,869.¹² Most LPs (70%) indicated earning less than that, although six (14%) indicated earning more, and seven (16%) elected not to respond.

They survey indicated 94% of clients indicated being satisfied or very satisfied with the fees charged by their LP. Two clients specifically discussed fees in their comments:

The legal fees were expensive, and I [sic] today's world I don't know how anyone could get an attorney. I had to barrow [sic] money to obtain mine.

Overall, my experience with having a Legal Paraprofessional was exceptional and I felt I got more communication than I had with my prior attorney about the status of my case. Not only did she advocate for me and my children with the Court, but she handled issues with my spouse quickly with his attorney. The Legal Paraprofessional's hourly billing rate was lower than my attorney's rate and I definitely believe I got more for my money with her without going through my whole savings account.

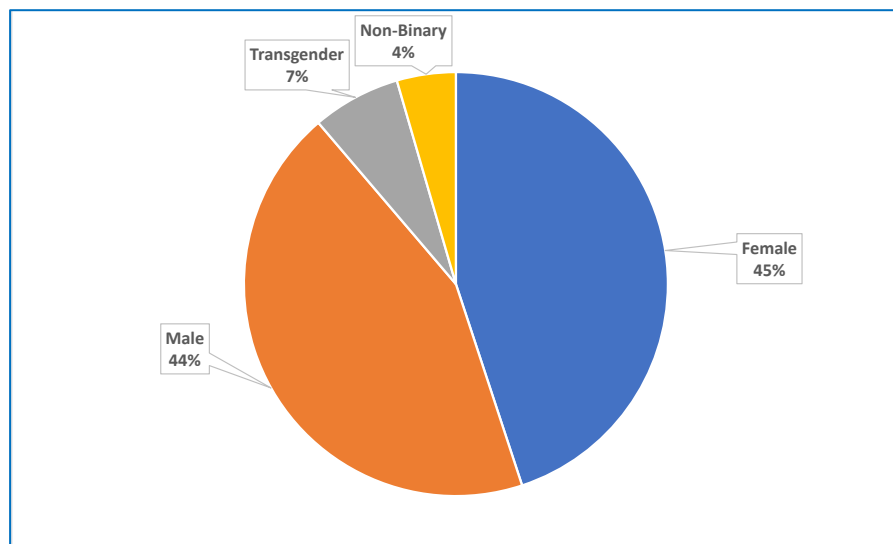
¹¹ *Average attorney fees by state 2024*. (n.d.). <https://worldpopulationreview.com/state-rankings/average-attorney-fees-by-state>

¹² *Attorney salary in Arizona*. (2024, December 29). <https://www.indeed.com/career/attorney/salaries/AZ>

The financial benefits of LPs and their ability to provide access to legal services for low-income individuals are supported in reports across the country and Canada. In 2012, the Attorney General for Ontario, Canada, concluded a five-year study of their program, where they are known as Paralegals and widely regarded as the first in North America, that demonstrated 74% of clients surveyed were satisfied or very satisfied with the services they received from a LP and 68% agreed the services received were of good value.¹³ A LP participating in Minnesota’s pilot program said in 2023, “This case was a perfect example of how the project works. I was able to save [the client] a significant amount of money, for a small fee.”¹⁴

Whom Do LPs Represent?

Arizona’s LP clients predominately reside in Maricopa and Pima Counties. In addition to



Maricopa and Pima Counties, LPs reside in Coconino, Cochise, Mohave, Yavapai, and Yuma Counties. LP services have been provided in the rural growing communities of

Figure 8 -- Client Identification by Gender

¹³ Law Society of Upper Canada. (2012). (rep.). *Report to the Attorney General of Ontario*. Toronto, Ontario, CN.

¹⁴ Minnesota Supreme Court Standing Committee for Legal Paraprofessional Pilot Project. (2024). *Final Report and Recommendations*. Saint Paul, MN.

Flagstaff, Prescott/Prescott Valley, and Yuma. There is still a coverage gap in coverage for Arizona's other eight more rural counties which largely include the Navajo, Hopi, and Apache

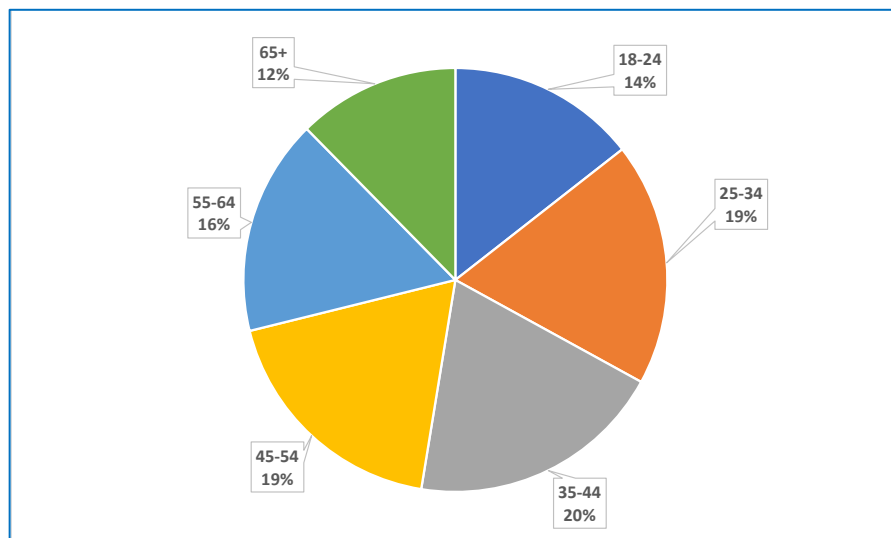


Figure 9 -- Client Identification by Age

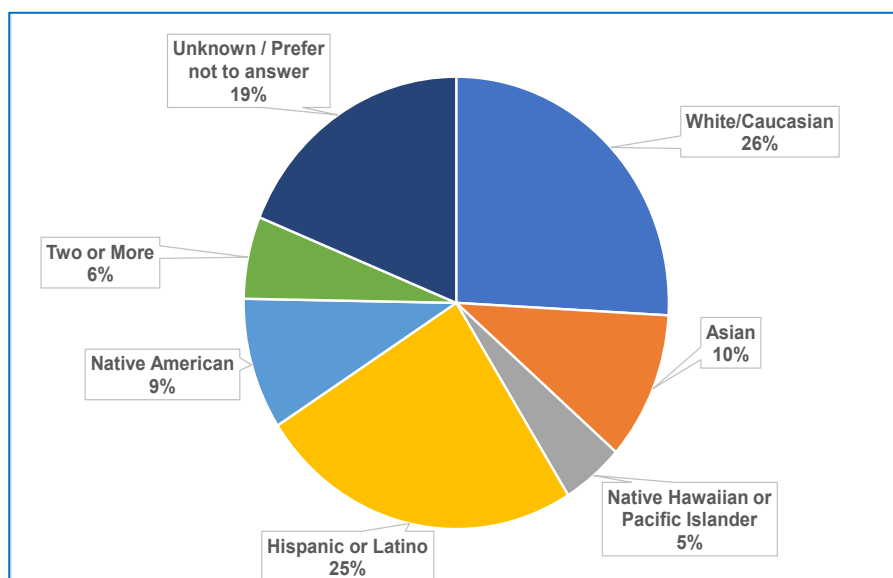


Figure 10 -- Client Identification by Ethnicity

nations along with wider open ranch and agricultural land. LP distribution is in line with the state's distribution of attorneys.

Clients are equally representative of men and women. While evenly distributed among age brackets, the largest representation at 20% is aged 35-44.

LPs reported diverse ethnicities for their clients as well: White/Caucasian (29%), Hispanic or Latino (25%), or Native

American (9%). The majority of clients have at least a high school education or G.E.D. while 41% have at least some college, an Associate's degree, or a Bachelor's degree. Nearly half of all clients

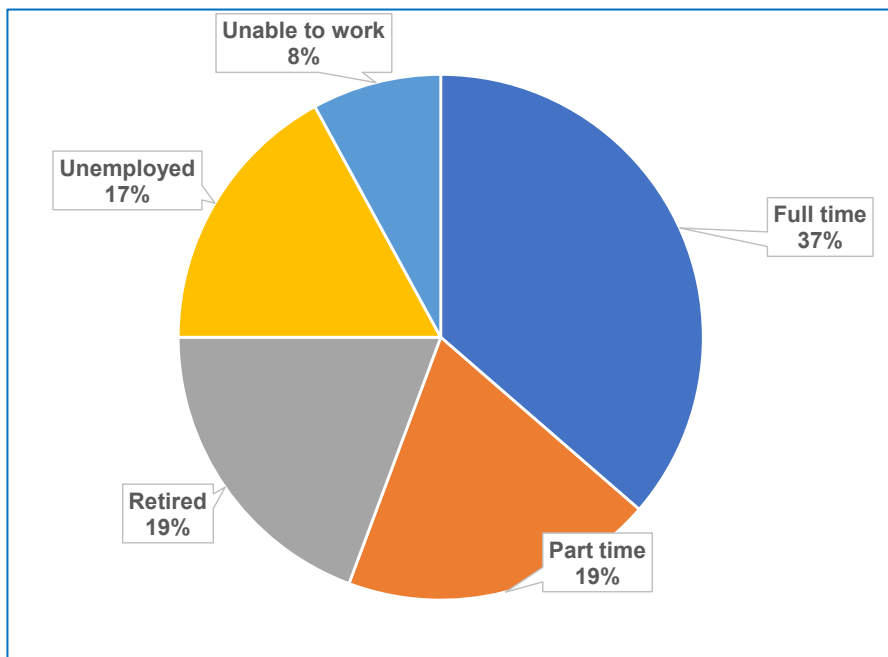


Figure 11 -- Client Reported Employment Status

(49%) are employed full or part time with 22% reporting as unemployed or unable to work. Most clients (63%) earn less than \$89,000 per year, putting them in a low-middle income bracket.

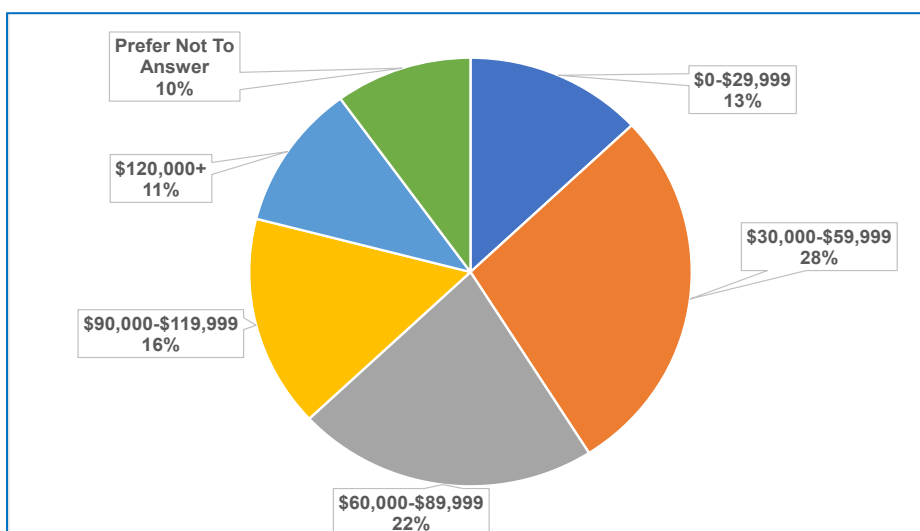


Figure 12 -- Client Reported Annual Income

Courtroom Response and Training

Since the program was developed, there has been much said about the training LPs receive. While in most cases they are not law school graduates, LPs do have experience in the legal community, as many have a paralegal background. Others have post-graduate degrees in Legal

Studies from institutions accredited by the American Bar Association. In 2020, 67.5% of the public who were surveyed agreed LPs would need extensive training, testing, and certification processes, including “significant academic credits on legal ethics,” to ensure they are held to a high standard.¹⁵

Judges and attorneys were asked to consider the LPs they have seen in court. Most judges (88%) and 55% of attorneys agreed or strongly agreed that LPs were aware of applicable court rules. Further, 90% of judges and 59% of attorneys believed LPs displayed appropriate courtroom decorum. Despite these positive perceptions, some survey comments from judges and attorneys asserted that nonlawyers should never be allowed to represent clients in court. At least once survey respondent acknowledged that the quality of representation was in the individual, not their credentials.

Judges and attorneys agreed that LPs could benefit from additional training and support. Recommended topics from both groups included:

- Rules of procedure
- Forms
- Knowledge of court rules
- Training on filing pleadings
- Rules of evidence

Multiple attorneys wrote what is missing most from LP training is law school. Many judges and attorneys recommended that LPs be required to obtain Continuing Legal Education (CLE) credits, as attorneys are required to obtain, that LPs be trained on legal research, rules of ethics, and a formal degree program “specifically designed to teach them the skills they will need.” These responses can be attributed to limited knowledge in the profession of the LP training requirements and scopes of practice. LPs must earn the same 15 CLEs per year required of

¹⁵ Arizona Supreme Court, *State of Arizona Public Opinion Survey*.

attorneys, are required to complete coursework on legal research and ethics, and, although not a required track, degree programs focusing on the specific training needs of LPs are available at Arizona's two law schools and through several community colleges. These survey responses are an opportunity to provide the bench and bar additional training and awareness of the LP program.

LPs agree with the importance of training and awareness in the legal community. LPs report attending regular CLE opportunities, subscribing to case law updates and journals like *Arizona Attorney* and *Maricopa Lawyer*, participating with membership options in their local bar association, and building connections with attorneys and other professionals.

When asked about recent workshops, conferences, or other trainings, LPs report attending the State Bar of Arizona Convention, CLEs from the Maricopa County Bar Association, a seminar on real estate in divorces, the Family Law Institute's "For Better or Worse", seminars on ethics, the Maricopa County Public Defender's 2024 Mental Health Conference, and several family law institutes.

Training requests from LPs differ from the suggestions from attorneys and judges, including:

- Criminal law
- Practical and procedural trainings for new LPs
- Mentorships
- Research tools and technology
- Improved training for judges to understand what services LPs can provide
- Parenting plans and divorce settlements
- Retirement plans
- Trial and hearing preparation and how to litigate in front of a judge
- Personal injury
- More training in Yavapai County

In addition to training and resources, LPs asked for more respect from others in the legal community. When asked about their most significant challenges, LPs responded:

- ❖ Not all attorneys give the same respect to LPs as they would other attorneys.
- ❖ Dealing with rude and unprofessional opposing counsel
- ❖ Recently, the Court referred to me as a document preparer in the middle of a trial. It emboldens the other side while making my client feel they are not being fully represented. Recently a Court greatly minimized my client's claim for legal fees because 'you hired a paralegal and you were overcharged'.
- ❖ The lack of respect from attorneys. Many treat you as though you are ignorant and easily bullied. They tend to fail to adhere to the rules of procedure while demanding that you do.
- ❖ Knowledge of the public of our existence.

There is still much to do to inform the legal community and the public of the LPs' scopes of practice and the option of hiring a LP instead of hiring an attorney or being self-represented for certain cases. CLD will continue to work with its partners at bar associations, colleges, and universities to assist with developing training opportunities and conference presentations.

The survey results indicate that, to the extent attorneys fear LPs will “steal clients” or take away cases, those concerns are misplaced. LPs reported referring cases and clients to attorneys 28% of the time. Examples of when LPs refer cases included when the work is beyond the scope of their license, when a matter is complicated and additional assistance is needed (e.g. for an appeal), when a business is involved with a divorce case, and when a matter requires a qualified domestic relations order (QDRO). The 2019 Task Force report further illustrates the important division between LPs and attorneys,

Evidence exists that licensing nonlawyers to provide limited legal services will not undermine the employment of lawyers. The legal needs targeted for (LPs) involve routine, relatively straight-forward, high-volume but low-paying work that lawyers rarely perform, if ever.

Moreover, to date no jurisdiction that allows certified nonlawyers to provide limited legal services has reported any diminution in lawyer employment. The task force acknowledges that some lawyers may prove instinctive skeptics on this

issue, but the task force can find no empirical evidence that lawyers risk economic harm from (LPs) who provide limited legal services to clients with unmet legal needs.¹⁶

General Program Satisfaction

Opinions vary regarding the effectiveness of LP representation and whether the program has improved access to justice.

When the public was asked in 2020 about the Court's proposal to license trained and tested non-lawyers to provide defined-scope legal services at a lower cost, 80.3% reacted favorably.¹⁷

When actual LP clients were asked in 2024 about their satisfaction with the services they received, the response was even stronger:

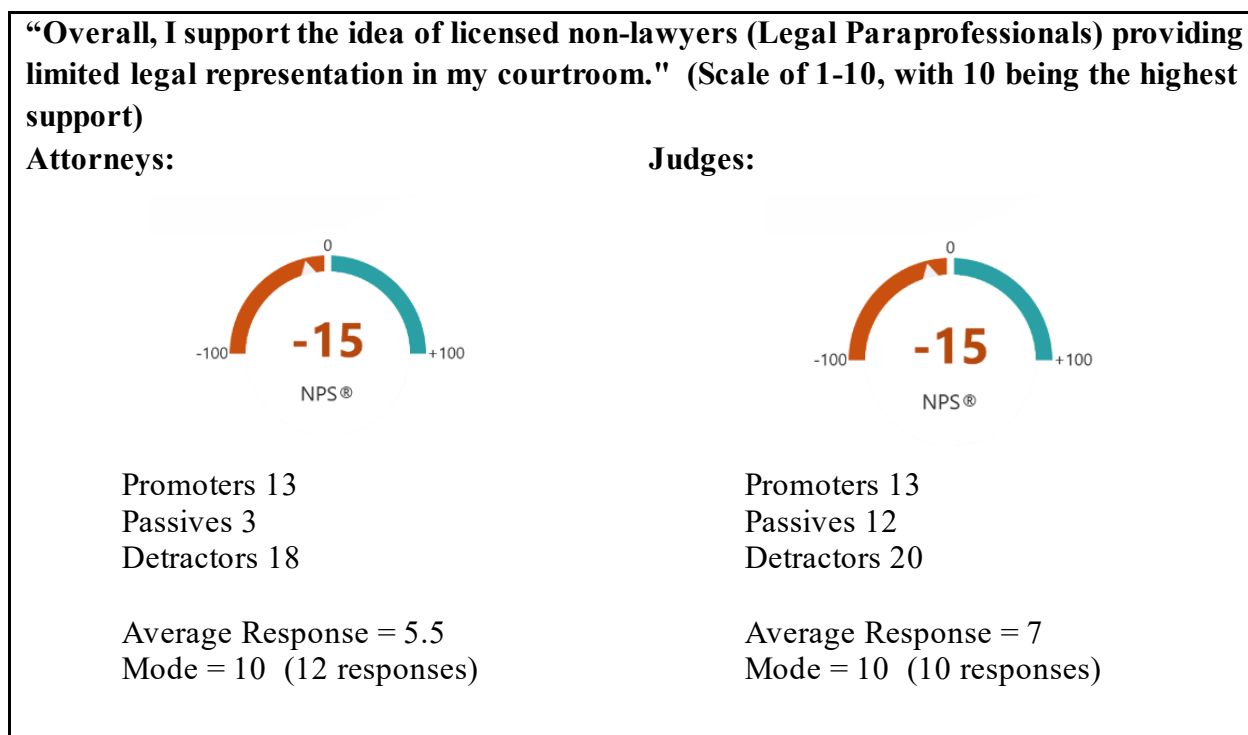
- 100% of clients were satisfied or highly satisfied with the LP services received.
 - 97% were satisfied or highly satisfied with their LP's communication skills.
 - 100% were satisfied or highly satisfied with how their LP responded to their case and their needs.
 - On a scale of 1 to 10, with 10 being the highest recommendation, clients responded with a score of 9.88 for how likely they would be to recommend a LP to a friend or family member. 91% rated a 10.
-
- ❖ I would use a Paraprofessional again, specifically mine and have recommended her to others. I think it's an affordable alternative for single mothers (and fathers alike) to get the representation they need without going into excessive debt.
 - ❖ My legal paraprofessional was outstanding, responsive, knowledgeable, tough, organized, transparent, empathetic, this type of resource is special and should be maintained and expanded. I am deeply grateful to have been able to connect And be represented by my paraprofessional.
 - ❖ I initially was assigned a Sr. Lawyer then downgraded to a legal paraprofessional within the same legal team and I must say it has been an awesome experience since then. The legal paraprofessional that I have been assigned is very down to earth, listens very well, has an acute attention to detail and most importantly comes across like she genuinely cares.

¹⁶ Arizona Supreme Court, *Task Force on the Delivery of Legal Services: Report and Recommendations*.

¹⁷ Arizona Supreme Court, *State of Arizona Public Opinion Survey*.

Attorneys and judges were asked to provide a net promoter score and then support their rating with comments. A net promoter score is placed on a scale of -100 to 100, where the percentage of Detractors (those rating 0-6) is subtracted from the percentage of Promoters (ratings of 9-10) and is one measure of the opinion of success and potential growth.

Table 2 -- Attorney and Judicial Officer Net Promoter Scores



Six Superior Court judges commented as follows:

- ❖ I've been extremely impressed with the LPs in my courtroom. They are better than many of the attorneys.
- ❖ Generally, the Legal Paraprofessionals that have appeared before me have been prepared. I find that they are not as effective as attorneys, but I expect that given the difference in education and, in many cases, in experience.
- ❖ varies greatly between practitioner, just like lawyers. access to justice is good, more training re court procedures and decorum would be helpful
- ❖ Most do a terrific job; some do not. But that is no different than attorneys who appear before me.

- ❖ The quality varies significantly from paraprofessional to paraprofessional. Overall, they can be helpful, but I would prefer if there was some oversight from a licensed attorney (somewhat like a physician's assistant in the medical field). I have concerns that in some cases, the litigant is unaware of the difference between attorney and paraprofessional representation.
- ❖ I believe Legal Paraprofessionals serve an important role in the legal profession, but need more training and should be licensed.

Challenges notwithstanding, the LPs remain positive about the work they do. When asked what they felt was most rewarding about their work, most LPs shared that they are able to help people when they need it most.

- ❖ I absolutely love people. I enjoy being able to shed some light in their life as much as possible during the hardest time in their life.
- ❖ Helping people who otherwise could not afford good legal representation or may have tried to represent themselves.
- ❖ Seeing cases all the way through as counsel, providing thorough representation with empathy and care, something people don't get much anymore as seasoned attorneys seem to get cold to things after years, helping Fathers receive proper representation and obtain recognition for the importance of their role in children's lives
- ❖ Helping our government agency get child support for children. As an LP, I fill a growing gap of being able to fill a position that we have struggled in hiring an attorney in the public sector
- ❖ Being able to help clients during one of the most difficult times in their lives and giving them a voice before the Court.

The positive comments from both LPs and clients indicate there is a perception of improved communication and access to legal assistance that more easily guides a client through the legal system than what might have happened if they were self-represented. This survey did not compare LP, self-represented, and attorney-represented cases for the number and resolution of cases that went to court along with the length of time and expense of those cases.

Although critical comments can inform and improve the LP program, the Court has committed to LPs as one avenue to promote access to justice. The oft-compared Nurse Practitioner field has been “providing primary care for 45 years, and there is strong evidence that this care is cost effective, of high quality, and of great service in increasing access to care for vulnerable populations.”¹⁸ Arizona anticipates the same will be true for LPs.

AOC Certification and Licensing: Getting it Done

A key part of the Legal Paraprofessional program is its licensing process but data points about the process and the staff had not been measured. It is important to include this performance in a discussion of the program’s effectiveness and responsiveness.

A main component of the application process for prospective LPs are the Core and Practice Area exams. An applicant must pass the Core exam, which focuses on general legal practices, procedures, and ethics. They must also pass an exam for each licensed area of practice. Some LPs are licensed in more than one area. Few pass the exam on their first attempt. In 2024, all exams were reviewed to ensure accuracy with applicable authorities, including statutes, court rules, and the administrative code. CLD continues to revise LP resource materials. Those materials are posted to the program [website](#).

¹⁸ Pohl, J. M., “Who Will Provide Primary Care and How Will They Be Trained?” (pp. 167–214).

Table 3 -- Exam Passing Rate as of December 11, 2024

	Core	Family Law	Civil Law	Criminal Law	Administrative Law	Juvenile Law
Total Attempts 2021-2024	310	192	64	30	7	1
Total Passing 2021-2024	139 45%	81 42%	16 25%	12 49%	0	1 100%
Average Passing Score	77.25	77.22	75.73	77.42	N/A	74.00

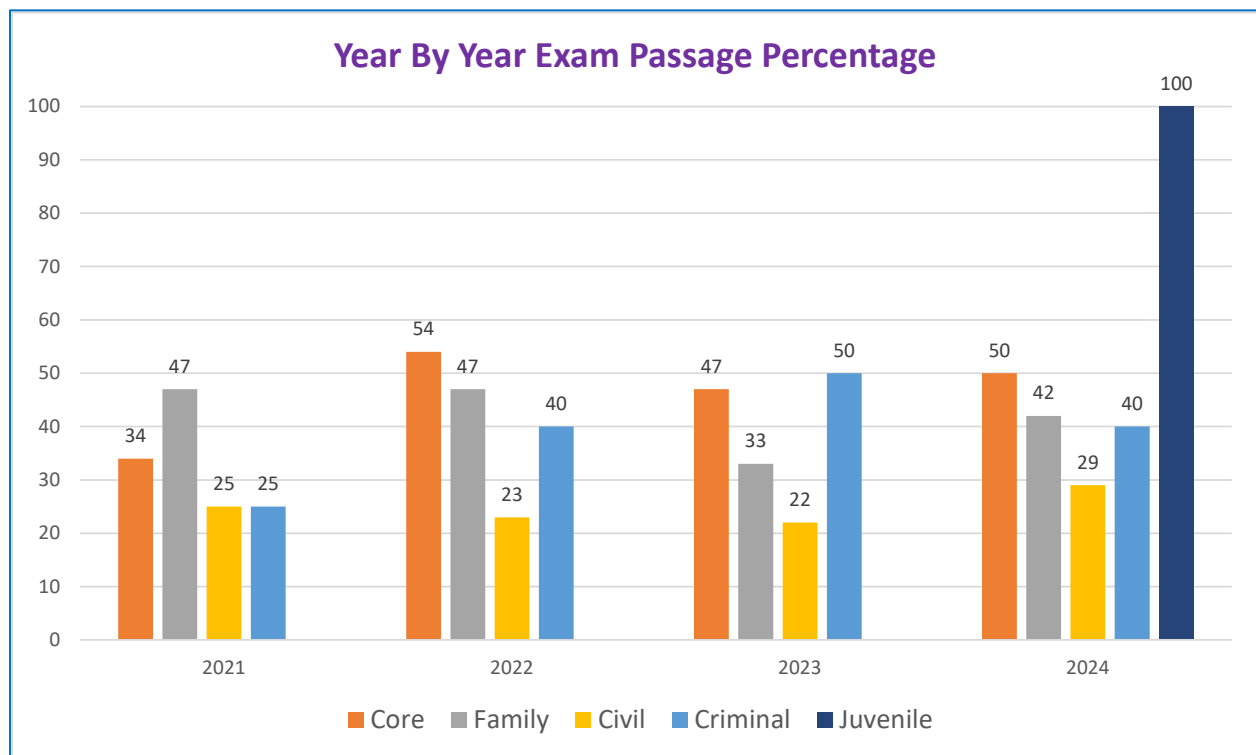


Figure 13 -- Exam Year by Year Passing Percentage

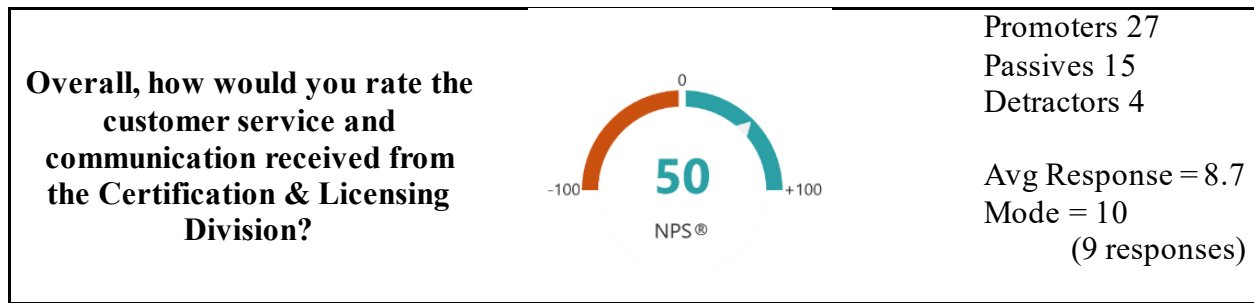
Regarding the exam and application process, 78% of LPs were satisfied or very satisfied with the application process. Areas for improvement included making the application process less complicated and the online registration more user friendly. Most respondents (77%) were satisfied

with the exam process. For those not fully satisfied with the exam process, the top two reasons were that study materials were inadequate (36%) and travel to Phoenix, where the exams are conducted, was inconvenient (27%). CLD is pursuing ways to improve the application and exam processes which may eventually include online/virtual exam proctoring.

The LP program was initially supported in 2020 by one manager with limited administrative help and ran alongside another new program launched at the same time – Alternative Business Structures (ABS). Since then, the LP and ABS programs split, and the LP program is currently supported by limited administrative help and 2.5 full time staff equivalents, including one manager who reports to the Division Director. This team is responsible for all communications with current and prospective LPs, exam review and development, resource materials development, website management, data collection, application review, background reviews, fingerprint checks, fee payment collections, and preparing all LP materials for the LPs’ regulatory board, the Board of Nonlawyer Legal Service Providers. The regulatory board makes final licensure decisions based on CLD’s recommendations.

There are many wheels in motion in the LP program and, while some are automated, most require a personal touch and clear communication. In 2024, the team established informal performance measures designed to increase the speed of background investigations and improve the timeliness of email and phone responses to inquiries. The team also focused on strengthening their customer service visibility. LPs were asked to provide a Net Promoter score of their perception of CLD’s level of customer service and communication, then explain their rating.

Table 4 -- LP Net Promoter Score of CLD



- ❖ The current LP director is amazing and I was lucky that he was the LP director while I finalized the remaining stages of my application.
- ❖ The investigator assigned to my application was extremely helpful.
- ❖ communication with the LP staff was always prompt and efficient
- ❖ I am incredibly grateful for the Certification & Licensing Division. Their prompt, professional responses and guidance have been invaluable. Managing this division is no small task, and I truly appreciate having their support.
- ❖ It is extremely difficult to reach a staff member. However, I do understand that during the time my application was submitted, they were short staffed. That issue was resolved after hiring an investigator.
- ❖ [The manager] and his staff are great, keep it up.

Lessons Learned

Recommendations

CLD reviewed the survey responses and determined several action items, some of which have already been implemented:

- Improve study guide and resources. Add a focus on rules of procedures and evidence.
- Communicate with training institutions the need to provide additional resources and training on rules of procedures and evidence.
- Potentially update ACJA 7-210 to include increased CLE requirements for evidence and procedures.
- Update ACJA 7-210 address qualifications for practice in probate, QDROs, and adoptions.
- Establish a mentorship network.
- Develop CLE and conference presentations for judges and attorneys to increase awareness of LPs and their scopes of practice.
- Submit articles to Bar Association publications. Discuss training, evaluation, and ethical review standards.
- Offer exams online.
- Develop LP networking opportunities and communication/e-news.
- Name change to Legal Practitioner (a rule petition was filed to change the name and was denied by the Supreme Court in 2024).
- Add additional questions on child support guidelines and case law to the Family Law exam.
- Training on retirements and investments.
- Involve current LPs in the application review process.

Questions for the Future

Some questions still need to be asked to fully rate the effectiveness of the LP program and whether it is improving access to justice. These questions, some borrowed from surveys completed in Minnesota; Oregon; Colorado; and Ontario, Canada, may be asked on future surveys to ensure the program continues to evolve as an asset to the legal process.

Table 5 -- Potential Future Survey Questions

Question	Data Source or Group to Ask					
	CIS	General Public	Clients	LPs	Attorneys	Judges
How many cases statewide involve Legal Paraprofessionals and what types?	X					
What is/were the resolution of those cases?	X					
Why was a LP selected rather than an attorney or self-representation?			X			
How were the LP and their services selected?			X			
How easy was it to locate a LP?			X			
How was the LP's experience level determined?	X		X	X		X
What was the cost of legal representation?			X			
How beneficial has the LP program been for Arizonans?		X	X	X	X	X
How well has the LP program improved access to justice?	X	X	X	X	X	X
Did the LP degree program, or job experience, adequately prepare you?				X		
How fair is the justice system in Arizona?			X	X	X	X
Do you feel the Supreme Court's LP program improves fairness and access to justice?		X	X			

Summary

Arizona's Legal Paraprofessional program is a key contributor to achieving the goals in *...and Justice for All*, Supreme Court Chief Justice Ann A. Scott Timmer's 2024-2029 strategic agenda for the Arizona Judicial Branch.

LPs, and other non-lawyer practitioners across the nation, are often compared to Nurse Practitioners as an easy way to understand where they fit in the legal community. The field of Nurse Practitioners (NPs) came about in the mid-1960s as a response to a physician shortage, particularly in pediatrics. Nursing programs today graduate more than 7,000 NPs annually.¹⁹ Similarly, Legal Paraprofessionals were established as a way to address the attorney shortage in Arizona and its national ranking of 49th in access to legal services.

The LP program started small, in 2021, with licensure in three practice areas. The LP program further expanded from its Family, Civil, and Criminal Law foundation to add Administrative Law and Juvenile Dependency Law. In 2025 the program will continue to expand with the potential addition of qualifications for preparing QDROs and licensure for a Probate scope of practice. Educational opportunities and outreach activities will also continue to grow.

This 2024 survey provided valuable data to understand the reach of the LP program, and there is more to learn. The survey confirmed that clients are satisfied with the service they receive and appreciate connecting with the legal system at a lower cost and with more satisfactory outcomes. The survey also revealed that many attorneys and judges are not fully informed of the program's reach which causes confusion and, for some, a negative impression. As with NPs and their relationships with medical doctors more than 40 years ago, Arizona

¹⁹ Pohl, J. M., "Who Will Provide Primary Care and How Will They Be Trained?" (pp. 167–214).

anticipates that with time and further education and resources, LPs will gain the similar respect from their legal colleagues and recognition from the public.

The CLD staff will focus on improving the LP program with a focus on revising and improving the exam study guides, promoting the development of continuing education opportunities, and implementing online exams with virtual proctoring. LP program staff will also be involved with ongoing access to justice pilot programs and initiatives, such as implementing community-based justice worker models. Lastly, the program anticipates licensing its 100th Legal Paraprofessional and surpassing that number in 2025.

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Appendix A – Questions and Response Data

Clients

1	Since 2021, have you received legal representation or advice from a licensed Legal Paraprofessional in Arizona?	Yes= 32 (94%) No= 2 (6%)
2	Overall, how satisfied were you with the Legal Paraprofessional services you received?	Very Satisfied=30 (94%) Satisfied=2 (6%)
3	Overall, how satisfied were you with the Legal Paraprofessional's communication skills?	Very Satisfied=29 (1%) Somewhat Satisfied=2 (6%) Somewhat Dissatisfied=1 (3%)
4	Overall, how satisfied were you with the Legal Paraprofessional's responsiveness to your case?	Very satisfied=29 (91%) Somewhat Satisfied=3 (9%)
5	Was your Legal Paraprofessional able to successfully resolve your case to your satisfaction?	Yes 25=(81%), No Other (19%): ❖ Partially! My case has two parts and one part is resolved to satisfaction, the other part is still in progress ❖ case ongoing ❖ still in processing ❖ Yes, but it is still ongoing.
6	Was it necessary for your Legal Paraprofessional to transfer or refer your case to an attorney for resolution?	Yes=2 (6%) No= 23 (72%) Don't Know or Don't Recall=7 (22%)
7	Overall, how satisfied were you with the fees charged by your Legal Paraprofessional?	Very Satisfied=21 (66%) Somewhat Satisfied= 9 (28%) Neutral=1 (3%) Other= 1 (3%) ❖ Still in processing
8	On a scale of 1 to 10, with 10 being the highest recommendation, how likely are you	10=29 (91%) 9=2 (6%) 8=1 (3%)

	to recommend a legal paraprofessional to a friend or family member?	Average=9.88
9	What is your gender identity?	Female=25 (78%) Male=7 (22%)
10	What is your age range?	25-34 years old=9 (28%) 35-44 years old=7 (22%) 45-54 years old=12 (38%) 55-64 years old= 3 (9%) 65+ years old= 1 (3%)
11	With which ethnic background do you identify?	White/Caucasian= 23 (72%) Hispanic or Latino= 3 (9%) African-American= 1 (3%) Native American=1 (3%), Other=1 (3%) Unknown=1 (3%) Prefer not to say= 2 (6%)
12	What is the highest level of education you have attained?	High school (including GED)=6 (9%) Some college (no degree)=8 (25%) Technical certification=2 (6%) Associate degree (2-year)=4 (13%) Bachelor's degree (4-year)=8 (25%) Master's degree=2 (6%) Professional degree (JD, MD)=1 (3%) Prefer not to say=1 (3%)
13	What is your employment status?	Full-time=19 (59%) Part-time= 7 (22%) Retired=2 (6%) Unemployed=1 (3%) Unable to work= 2 (6%) Prefer not to say= 1 (3%)
14	What is your annual household income?	\$0-\$29,999= 4 (13%) \$30,000-\$59,999= 9 (28%) \$60,000-\$89,999= 3 (9%) \$90,000-\$119,999=6 (19%) \$120,000+ =3 (9%) Prefer not to say= 7 (22%)

15	What language is primarily spoken in your home?	English 32 (100%)
16	In which county do you reside?	Maricopa= 17 (53%) Mohave=4 (13%) Pima=4 (13%) Pinal=1 (3%) Santa Cruz=1 (3%) Yavapai=6 (19%)
17	Do you have any general comments or concerns about your Legal Paraprofessional representation? Please do not include names or reference your case.	See Appendix B – Comments

Attorneys

1	Are you aware of Arizona's Legal Paraprofessional Program?	Yes=34 (89%) No=4 (11%)
2	How are you aware of the Legal Paraprofessionals? (Check all that apply)	Read or heard about the program 24=(44%) One or more LPs work in my firm 5=(9%) Clients have been referred to me by or from a LP=3 (5%) Co-represented a client with a LP 4=(7%) Was opposing counsel to a LP in court or on a case= 8 (15%) Other=11 (20%) <ul style="list-style-type: none"> ❖ CLE training in 2022 ❖ A former paralegal of mine became an LP ❖ Work at university of arizona (sic) ❖ I mentor two current LPs ❖ Work in paralegal dept at local community college ❖ I was considering taking the LP exam.

		<ul style="list-style-type: none"> ❖ Involved in a licensing issue against an LP ❖ Friend is an LP ❖ Reviewed the sub-standard and defective work that LP's provide. ❖ I took over a case where client was previously represented by a LP ❖ Was on task force that created LP recommendations to ASC
3	For what type of cases have you seen a Legal Paraprofessional represent clients?	<p>Eviction=3 (4%) Other Housing=1 (1%) Custody=12 (15%) Dissolution=20 (25%) Legal Separation=6 (8%) Child Support=15 (19%) Other Family Law Issue=13 (16%) Initial Appearance=2 (3%) Civil Litigation=1 (1%) Other=6 (8%)</p> <ul style="list-style-type: none"> ❖ Mediation ❖ Submission of paperwork ❖ None ❖ Estate planning
4	Thinking about the LPs you have observed in court or assisted with a client, how much do you agree: the LPs were aware of the applicable court rules?	<p>Strongly Agree= 6 (21%) Agree=7 (24%) Neither agree nor disagree=5 (17%) Disagree=8 (28%) Strongly Disagree=3 (10%)</p>
5	Thinking about the LPs you have observed in court or assisted with a client, how much do you agree: the LPs displayed the appropriate decorum in the courtroom?	<p>Strongly Agree=9 (33%) Agree=7 (26%) Neither agree nor Disagree=8 (30%) Disagree=1 (4%) Strongly Disagree=2 (7%)</p>
6	Based on your experience do you think the LPs required additional training or support?	<p>Yes= 20 (74%) No=7 (26%)</p>

7	What additional training, if any, do you believe would benefit the Legal Paraprofessionals appearing in your court?	See Appendix B – Comments
8	in your experience, do hearings where a party is represented by a Legal Paraprofessional take more or less time than hearings with self-represented litigants?	More time=9 (41%) Less time=13 (59%)
9	in your experience, do hearings where a party is represented by a Legal Paraprofessional take more or less time than hearings with an attorney?	More time=13 (65%) Less time=7 (35%)
10	Please respond to this statement, “Overall, I support the idea of licensed non-lawyers (Legal Paraprofessionals) providing limited legal representation in my courtroom.”	Net Promoter Score = -15 Promoters 13 Passives 3 Detractors 18
11	In what counties do you primarily practice?	Apache=2 (3%) Cochise=3 (5%) Coconino=4 (6%) Gila=2 (3%) Maricopa=22 (34%) Mohave=2 (3%) Navajo=2 (3%) Pima=13 (20%) Pinal=9 (14%) Santa Cruz=1 (2%) Yavapai=4 (6%) Yuma=1 (2%)
12	Please provide any additional comments or suggestions regarding the Legal Paraprofessional program. (Do not include LP or client names or any case information.)	See Appendix B – Comments

Judicial Officers

1	Have you had Legal Paraprofessionals represent clients in your court room?	Yes=41 (23%) No=130 (72%) Do not know=9 (5%)
2	Your court is located in which county?	Cochise=1 (2%) Coconino=3 (6%)

		Gila=1 (2%) Greenlee=1 (2%) Maricopa=29 (55%) Mohave=1 (2%) Navajo=2 (4%) Pima=6 (11%) Pinal=2 (4%) Yavapai=4 (8%) Yuma= 3 (6%)
3	What level is your court?	Municipal=11 (21%) Justice of the Peace=5 (10%) Superior=36 (69%)
4	For what type of cases have you seen a Legal Paraprofessional represent clients in your court?	Eviction=2 (1%) Custody=27 (20%) Dissolution=35 (25%) Legal Separation=13 (9%) Child Support=30 (22%) Other Family Law Issue=27 (20%) Initial Appearance=2 (1%) Other=2 (1%) ❖ Misdemeanor criminal cases ❖ DUI
5	Thinking about the LPs who have appeared in your court, how much do you agree: the LPs were aware of the applicable court rules?	Strongly agree=16 (39%) Agree=20 (49%) Neither agree nor disagree=1 (2%) Disagree=2 (5%) Strongly Disagree=2 (5%)
6	Thinking about the LPs who have appeared in your court, how much do you agree: the LPs displayed the appropriate decorum in the courtroom?	Strongly agree=28 (68%) Agree=9 (22%) Neither agree nor disagree=2 (5%) Disagree=2 (5%)
7	Based on your experience do you think the LPs required additional training or support?	Yes=21 (53%) No=19 (47%)
8	What additional training, if any, do you believe would benefit the Legal Paraprofessionals appearing in your court?	See Appendix B – Comments
9	In your experience, do hearings where a party is represented by a Legal Paraprofessional	More time=16 (42%) Less time=22 (58%)

	take more or less time than hearings with self-represented litigants?	
10	In your experience, do hearings where a party is represented by a Legal Paraprofessional take more or less time than hearings with an attorney?	More time=22 (67%) Less time=11 (33%)
11	Please respond to this statement, “Overall, I support the idea of licensed non-lawyers (Legal Paraprofessionals) providing limited legal representation in my courtroom.”	Net Promoter Score = -15 Promoters 13 Passives 12 Detractors 20
12	Please comment on the quality of representation provided by Legal Paraprofessionals in your court.	See Appendix B – Comments
13	Please provide any additional comments or suggestions regarding the Legal Paraprofessional program.	See Appendix B – Comments

Legal Paraprofessionals

1	What year were you licensed as a Legal Paraprofessional?	2021=5 (11%) 2022=14 (30%) 2023=14 (30%) 2024=13 (28%)
2	Do you still have an active membership with the State Bar of Arizona?	Yes=47 (100%)
3	If you answered no, what are your reasons for being inactive?	No responses
4	In what practice areas are you licensed?	Family Law=42 (86%) Civil Law=3 (6%) Criminal Law=4 (8%)
5	If additional qualifications were added to the specific practice area, would you be interested in adding an endorsement for:	Qualified Domestic Relation Orders (QDRO)=13 (17%) Probate=19 (25%) Adoption=26 (34%)

		<p>No new practice areas should be added=6 (8%) Other=13 (17%)</p> <ul style="list-style-type: none"> ❖ Property Deeds ❖ Orders of Protection within FL cases. ❖ Name Change. ❖ Estate Planning. ❖ Bankruptcies ❖ Pre/post nuptial agreements. ❖ Dissolution with a business and commercial property. ❖ Expand Juvenile to include terminations.
6	How did you learn about becoming a LP?	<p>Colleague Referral=13 (27%) Employer Referral=12 (24%) University or Paralegal Training=7 (14%) Professional Association Referral=1 (2%) AZ Courts website=9 (18%) Other=7 (14%)</p> <ul style="list-style-type: none"> ❖ I managed my attorney's emails and saw an email come through about the possibility of the license ❖ CLE ❖ Pima County Bar Association WRIT
7	Did you apply based on the education or experience track?	<p>Education=15 (32%) Experience=32 (68%)</p>
8	If you applied via the education track, what institutions have you attended to complete the education requirements?	<p>Arizona State University=6 (24%) Phoenix College=3 (12%) Pima Community College=2 (8%) University of Arizona=8 (32%) Other=6 (24%)</p> <ul style="list-style-type: none"> ❖ Lamson College ❖ Summit Law ❖ Everest College

		❖ Mitchell Hamline School of Law
9	What is your highest level of degree attained?	Associate with Paralegal Certificate=8 (19%) Other Associate=1 (2%) Bachelor (BA/BS)=13 (31%) Master of Legal Studies=8 (19%) Other Masters (MA/MS/MEd)=2 (5%) Juris Doctor=4 (10%) Other Doctorate (PhD/EdD)=1 (2%) Other= 5 (12%)
10	The costs of hiring a lawyer in Arizona are too high. Legal Paraprofessionals help reduce costs.	Strongly Agree=24 (51%) Agree=22 (47%) Neutral=1 (2%)
11	Most people living in poverty and the majority of moderate-income individuals do not receive the legal help they need. Legal Paraprofessional assist more people in accessing legal services.	Strongly Agree=23 (49%) Agree=22 (47%) Neutral=1 (2%) Disagree=1 (2%)
12	What counties do you serve?	Apache=7 (3%) Cochise=11 (5%) Coconino=13 (6%) Gila=9 (4%) Graham=7 (3%) Greenlee=7 (3%) La Paz=9 (4%) Maricopa=35 (17%) Mohave=11 (5%) Navajo=9 (4%) Pima=26 (13%) Pinal=25 (12%) Santa Cruz=10 (5%) Yavapai=19 (9%) Yuma=9 (4%)
13	In which county have most of your clients resided?	Cochise=1 (2%) Coconino=1 (2%) Maricopa=30 (68%) Mohave=2 (5%) Pima=8 (18%)

		Yavapai=1 (2%) Yuma=1 (2%)
14	How would you describe where you work as a paraprofessional?	Private Practice: Solo=10 (22%) Private Practice Law Firm: 2-50 attorneys and other LPs=31 (69%) Private Practice Law Firm: more than 50 attorneys and other LPs=1 (2%) Office of the Public Defender=1 (2%) Justice of the Peace Court=1 (2%) Other government agency=1 (2%)
15	Since becoming licensed, approximately how many clients have you represented or served?	See Appendix B – Comments
16	Are you still actively representing clients?	Yes=43 (93%) No=3 (7%)
17	If you answered No, why are you no longer representing clients?	<ul style="list-style-type: none"> ❖ I decided I did not want to litigate. I was happier assisting an attorney with transactional things, document preparation, brief/simple hearings if needed, and providing legal advice if needed when attorney not available. ❖ Teaching at GCU ❖ Received license ~ October 2024. Plan to start in early 2025 after notary received and holidays over.
18	How did clients find or connect with you?	<ul style="list-style-type: none"> ❖ Attorney referral=34 (29%) ❖ College/Other LP referral=23 (20%) ❖ Social media advertisement=13 (11%) ❖ Website=27 (23%) ❖ Print, TV, or Radio advertisement=2 (2%) ❖ Other=17 (15%) ❖ Personal referral ❖ Word of mouth

		<ul style="list-style-type: none"> ❖ Family and friends ❖ LP Directory ❖ Represent client government agency and their cases ❖ I worked a public defense office. I am assigned to work with Community Court. We are appointed per court hearing for clients.
19	How often do you interact with clients?	Daily=37 (84%) Weekly=5 (11%) Monthly=1 (2%) Rarely=1 (2%)
20	What type of work have you provided, most often?	Document preparation=9 (20%) Research=1 (2%) Legal advice=13 (30%) Mediation=1 (2%) Representation in court=12 (27%) Other= 8 (18%)
21	Have you represented a client who you believe would otherwise have been self-represented?	Yes=38 (86%) No=6 (14%)
22	If you answered Yes, approximately what percentage of your clients would have been self-represented?	See Appendix B – Comments
23	How often have you had to refer a client to an attorney to resolve their case?	10% of clients=18 (41%) 25% of clients=1 (2%) Not at all=25 (57%)
24	If you entered any percentage, what is the top reason why you referred your client to an attorney?	See Appendix B – Comments
25	Do you have professional liability insurance?	Yes=34 (77%) No=10 (23%)
26	If you answered Yes, at what level or how much insurance do you carry?	See Appendix B – Comments
27	How are most of your cases resolved?	Settlement=31 (70%) Plea=1 (2%)

		Mediation=1 (2%) Trial Verdict=2 (5%) Directed Verdict=1 (2%) Other=8 (18%) ❖ Plea ❖ Evidentiary hearing ❖ Final judgment or Order of the Court
28	How do you charge for services?	Pro Bono=3 (6%) Hourly Rate=39 (74%) Flat Fee=7 (14%) Other/Contingency Based=4 (8%)
29	If you charge for services with multiple or various rates, which is most common?	Hourly Rate=35 (92%) Flat Fee=1 (3%) Other / Contingency Based=2 (5%)
30	If applicable, what is your hourly rate?	See Appendix B – Comments
31	If applicable, what is your flat fee?	See Appendix B – Comments
32	What is your average annual income from Legal Paraprofessional services?	\$0-\$29,999=3 (7%) \$30,000-\$59,999=5 (11%) \$60,000-\$89,999=13 (30%) \$90,000-\$119,999=10 (23%) \$120,000+ =6 (14%) Prefer not to say=7 (16%)
33	Your clients identify as	Female=33 (40%) Male=32 (39%) Transgender=5 (6%) Nonbinary=3 (4%) Prefer not to say=6 (7%)
34	Your clients are	18-24 years old=26 (14%) 25-34 years old=34 (18%) 35-44 years old=37 (19%) 45-54 years old=35 (18%) 55-64 years old=31 (16%) 65+ =23 (12%) Prefer not to answer= 5 (3%)
35	With which ethnic background(s) do your clients identify?	White/Caucasian=28 (22%) Asian=12 (9%)

		<p>Native Hawaiian or Pacific Islander=5 (4%) Hispanic or Latino=27 (21%) African-American=19 (15%) Native American=10 (8%) Two or more=7 (5%) Other=1 (1%) Unknown=9 (7%) Prefer not to say=11 (9%)</p>
36	What level(s) of education have your clients attained?	<p>Less than High School=11 (6%) High school (including GED)=25 (14%) Some college (no degree)=26 (15%) Technical certification=16 (9%) Associate degree (2-year)=2 (12%) Bachelor's degree (4-year)=25 (14%) Master's degree=17 (10%) Doctoral degree=10 (6%) Professional degree (JD, MD)=9 (5%) Unknown=10 (6%) Prefer not to say=5 (3%)</p>
37	In general, what are your clients' marital statuses?	<p>Married=39 (32%) Widowed=5 (4%) Divorced=28 (23%) Separated=18 (15%) Single=28 (23%) Unknown=2 (2%) Prefer not to say=1 (1%)</p>
38	In general, how are your clients employed?	<p>Full-time=36 (32%) Part-time=19 (17%) Contract or temporary=7 (6%) Retired=19 (17%) Unemployed=17 (15%) Unable to work=8 (7%) Unknown=4 (4%) Prefer not to say=1 (1%) Other=2 (2%) ❖ Self-employed</p>

39	In general, what is the annual household income of your clients?	\$0-\$29,999=14 (13%) \$30,000-\$59,999=29 (28%) \$60,000-\$89,999=23 (22%) \$90,000-\$119,999=17 (16%) \$120,000+ =11 (11%) Prefer not to say=10 (10%)
40	In general, what are the primary languages spoken by your clients?	English=43 (70%) Spanish=16 (26%) Prefer not to say=1 (2%)
41	How satisfied were you with the ease of the exam process?	Very satisfied=2 (47%) Satisfied=14 (30%) Neither Satisfied nor Dissatisfied=7 (15%) Dissatisfied=3 (6%) Very Dissatisfied=1 (2%)
42	If you selected Dissatisfied or Very Dissatisfied, what challenges, if any, existed for the licensure exam process?	Travel to Phoenix is inconvenient=3 (27%) Travel to Phoenix is expensive=1 (9%) Communication from CLD staff=1 (9%) Difficulties with registration portal=1 (9%) Study resources=4 (36%) Too many distractions in the room=1 (9%)
43	What suggestions do you have to improve the exam process?	See Appendix B – Comments
44	How satisfied were you with the ease of the application process?	Very satisfied=27 (57%) Satisfied=10 (21%) Neither Satisfied nor Dissatisfied=5 (11%) Dissatisfied=4 (9%) Very Dissatisfied=1 (2%)
45	What comments or suggestions do you have to improve the application process?	See Appendix B – Comments
46	How do you stay up to date on legal developments and industry trends?	See Appendix B – Comments

47	What relevant workshops, seminars, or conferences have you recently attended?	See Appendix B – Comments
48	What additional training or resources would you like to see offered?	See Appendix B – Comments
49	What do you find most rewarding about your work as a Legal Paraprofessional?	See Appendix B – Comments
50	What are the most significant challenges you encounter as a Legal Paraprofessional?	See Appendix B – Comments
51	What additional suggestions or comments do you have to improve the Legal Paraprofessional program in Arizona?	See Appendix B – Comments
52	Overall, how would you rate the customer service and communication received from the Certification & Licensing Division?	Net Promoter Score = 50 Promoters 27 Passives 15 Detractors 4
53	Please explain your rating (optional)	See Appendix B – Comments

Appendix B – Comments and Open Ended Text

Clients

17. Do you have any general comments or concerns about your Legal Paraprofessional representation? **Please do not include names or reference your case.**

- ❖ [REDACTED] was and continues to be absolutely AWESOME. She has been a huge HUGE help in my case. I am so happy I cant even put it into words here. VERY HAPPY.
- ❖ None, I'm very happy we had [REDACTED] to help our family
- ❖ She did an amazing job. Confident and gets the job done
- ❖ Overall, my experience with having a Legal Paraprofessional was exceptional and I felt I got more communication than I had with my prior attorney about the status of my case. Not only did she advocate for me and my children with the Court, but she handled issues with my spouse quickly with his attorney. The Legal Paraprofessional's hourly billing rate was lower than my attorney's rate and I definitely believe I got more for my money with her without going through my whole savings account. I recommend her to all my friends and family.
- ❖ I would use a Paraprofessional again, specifically mine and have recommended her to others. I think it's an affordable alternative for single mothers (and fathers alike) to get the representation they need without going into excessive debt.
- ❖ My paraprofessional I used on my case was amazing and I couldn't say more great things about her.
- ❖ My legal paraprofessional was outstanding, responsive, knowledgeable, tough, organized, transparent, empathetic, this type of resource is special and should be maintained and expanded. I am deeply grateful to have been able to connect And be represented by my paraprofessional.
- ❖ I had a wonderful experience considering the circumstances. I would highly recommend her services to anyone.
- ❖ [REDACTED] is outstanding and I highly recommend her. Professional and always on top of it.
- ❖ The legal fees were expensive, and I today's world I don't know how anyone could get an attorney. I had to barrow money to obtain mine.
- ❖ Very lucky to have worked with her.
- ❖ I initially was assigned a Sr. Lawyer then downgraded to a legal paraprofessional within the same legal team and I must say it has been an awesome experience since then. Not sure if it's just a case of me getting lucky, but, my case has progressed to my satisfaction in just a short span of time. The legal paraprofessional that I have been assigned is very down to earth, listens very well, has an acute attention to detail and most importantly comes across like she genuinely cares.

Attorneys

7. What additional training, if any, do you believe would benefit the Legal Paraprofessionals you see in court?

- ❖ CLE
- ❖ There is very little knowledge of the rules of evidence, which are an issue at times and can really harm the client. Many do not know how to lay foundation. Additionally, there is almost zero knowledge of how to read and analyze case law. I believe there should be foundational courses on legal research techniques and trial practice before someone can apply. The State Bar should offer them free of charge to the LP applicants so that there is no further financial barrier to entry. I, as an attorney, would pay slightly higher dues to support those programs.
- ❖ Mandatory litigation boot camp similar to what is available for newer attorneys from AAML
- ❖ Continuing education like lawyers.
- ❖ N/A -- they weren't any better or worse than new lawyers. I've seen older, experienced lawyers who were a hell of a lot stupider than the LPs.
- ❖ The LPs I've worked with (a total of three so far) have been overly formalistic and are defensive. They apply the rules stridently like a first-year law student without a close enough regard to the facts or legal issues in a case. This is more of an experience issue. I've also found that the LPs I've worked with go immediately into defensive mode if challenged on the facts or law. It's as though they feel they are being judged for not being a lawyer (and one even expressed as much).
- ❖ I think LPs, just like attorneys, will benefit from continuing CLEs on substantive law and professional responsibility. All legal practitioners would benefit from this.
- ❖ Court rules and decorum
- ❖ Law school
- ❖ LP's are a disaster waiting to happen. It was irresponsible, and politically (not legally) motivated to conjure up this bizarre idea in the first place. Every since LP product I've seen has been defective, and several of them have led to expensive guardianship/conservator/probate litigation.
- ❖ This does not apply to the LP who works in our office. However, ones that have appeared in court opposite cases that I have handled lacked the experience to properly present evidence in a contested case or to properly phrase non-leading questions on direct examination.
- ❖ Family Law Disclosure and caselaw
- ❖ Law school. I do not agree with allowing non-lawyers to represent persons in court.
- ❖ A formal degree or program specifically designed to teach them the skills they will need. They are to lawyers but have almost the same power as lawyers, so they should not be given an easy path to representing clients in court. That would be a disservice to clients and the public.
- ❖ It is a terrible program. It was brought under the guise of access to justice when nearly all of the LPs charge as much as many attorneys. In addition, unreasonable and VERY

litigious when attorneys would handle the case differently due to better equipped education and analysis.

- ❖ Not applicable. I have never seen them working.
- ❖ Law school
- ❖ The LPs I have worked with/against have often crossed the limitations of the area of law they are in. One of them also made false accusations and ethical opinions regarding counsel.
- ❖ The law and the rules of ethics
- ❖ No different than any attorney in the same circumstance.

12. Please provide any additional comments or suggestions regarding the Legal Paraprofessional program. (Do not include LP or client names or any case information.)

- ❖ This is malpractice waiting to happen without additional required training, especially when you couple it with the fact that non-lawyers can now have financial interests in firms.
- ❖ I do not know of or observed any LP in practice. I would think of them as a step above self-representation, sort of like a friend with legal knowledge assisting someone with no legal knowledge through a case in order to save money. I would not consider them a licensed attorney. It's a good idea for those not willing or able to hire a licensed attorney, in a limited capacity, of course.
- ❖ This is a great idea, and it really needs to be further integrated into our legal services/legal aid system here in our state.
- ❖ The Supreme Court had this "access to justice" reason for bringing in LPPs. Yet I have had a LPP tell me they were charging \$200 to \$225 an hour for legal services. There are some lawyers who charge that. Thus, if a client can't afford to hire a lawyer at \$225, they still can't afford to hire a LPP at that. I do not think it has expanded access to justice one iota. It is a feel good measure. It is the same with allowing non-lawyers to own law firms. It has not expanded access to justice at all but is bad for the profession. LPPs should also be required to have malpractice insurance as they are not as trained as a lawyer (I personally think lawyers should be required to have insurance also but that is a losing battle in this state).
- ❖ I think it is a good, useful program, but there isn't enough awareness about it both in the legal community and in the general public. I also think the testing to become an LP is very poorly implemented. I looked over what they have to do as far as testing is concerned, and the material was very unhelpful and vague. If I had to deal with such shoddy and poorly put-together materials when I was studying for the bar, I would have had a very rough time of it.
- ❖ I think it's a great program and with additional experience (or mentoring), legal paraprofessionals will continue to provide a valuable alternative to hiring a lawyer.
- ❖ I would rather litigate against an LP than a pro per any day.
- ❖ There hasn't been sufficient publicity about this program and what areas of practice it covers. I've not seen any LPs in practice yet so I could not complete the survey.

- ❖ I have not had a case with an LP but anecdotally I have heard complaints from attorneys who have had cases with LPs.
- ❖ Non-lawyers shouldn't practice law.
- ❖ The program needs to be disbanded, and support should be given to actual lawyers who have studied extensively and learned the --- nuanced --- practice of law. In one, typical, case the LP simply filled in the dissolution forms without any explanation as to how they could be altered depending on the agreement of the parties, with the result that the forms did not reflect the parties' actual agreements, and, years later after one party died, the defect was discovered, but it led to expensive and protracted probate litigation. I see this kind of incompetence repeatedly. It is a disservice to the public to foist these 'minimally' trained 'professionals' on the public. The unsuspecting Public patronize these 'professionals', being ignorant of the vast difference between a LP and a licensed, competent, diligent attorney, and (I've actually heard this said) think that LP's are 'just as good as lawyers'. They are not and they never will be. Clients, even those with 'simple' matters, deserve legal advice that comes from having studied WHY it is that, e.g. Beneficiary Deeds are a horrible idea that often lead to a worse, and more expensive, result than if the Decedent had no estate planning at all. A bad idea who's day will never come.
- ❖ I think that the LP program is great and provides a needed service.
- ❖ It is very disturbing that it is relatively easy for someone to become an LP. There should be much more training and testing before allowing them to represent and advise the public. Lawyers must take a bar exam to prove that they can handle this responsibility. LPs should also be appropriately tested and vetted.
- ❖ The program needs to end. It is not good for the public. It is not good for the industry. It needs to end.
- ❖ I could not answer most of these questions because I have not seen any LP's at work. However, I have heard that they are charging significant hourly rates-- as high a rate as many sole practitioners. I do not think this is going to help access to justice. This is being treated simply as an easier path to practice than law school. I support the concept of the program-- that it could improve access to justice with lower priced service. If it is not lower priced, it is hard to justify it.
- ❖ I think this program is great for rural areas where Counsel is in demand. However, for counties over 250k, I believe it harms clients and the profession at large.
- ❖ We really need to get serious about expanding the practice areas of LPs. For example, there is an enormous amount of administrative/business work that does not involve court or administrative hearings, currently being done mostly by paralegals. LPs would be better at this, less expensive for the clients, etc.

Judicial Officers

8. What additional training, if any, do you believe would benefit the Legal Paraprofessionals you see in court?

- ❖ LPs appear to require a deeper understanding of the Rules of Procedure and how the Court is guided by the Rules of Procedure. It is not enough to file the correct documents with the Court and checking boxes urging the Court to render a decision; the Rules set forth procedure and deadlines that guide the parties so that, among other things, the opposing party has proper notice and the opportunity to be heard and the Court so the court may act in response to the filing(s). If an LPs is not familiar with the Rules and simply prepares documents and files those documents with the Court without strictly following the Rules, the result (if done without adhering to the Rules) is an unnecessary consumption of Court resources.
- ❖ LPs need to be aware of the court forms and procedures, as well as the applicable statutes and rules.
- ❖ Knowledge of the appropriate documents to file, how to effectuate service of process, knowledge of court rules.
- ❖ (1) A title or agreed-upon moniker. They should all announce as "Representative" or other title. (2) Every LPP should have a mentor or be required to practice as part of a group that contains an attorney. There seems to more of a lack of awareness of appropriate decorum / tone with the LPPs that are not present in attorneys. (3) Training on filing pleadings. The proposed orders especially don't seem to be in compliance or conformity with how attorneys file documents. For example, proposed orders do not have specificity with what is being requested and say things like "order what was requested in the motion" which is not a helpful order.
- ❖ Support - knowledge by our community/judges of their training, boundaries & abilities
- ❖ If the LPs are going to make objections, they should have more training in evidence.
- ❖ Law and procedure

12. Please comment on the quality of representation provided by Legal Paraprofessionals in your court.

- ❖ I've been extremely impressed with the LPs in my courtroom. They are better than many of the attorneys.
- ❖ Generally they have been very good. They are less familiar with complex issues than lawyers. LPs seem to have more difficulty than lawyers when working with self-represented litigants on opposing side.
- ❖ poor quality, deficient in knowledge of substantive law and rules of evidence
- ❖ Some are very good. Some cling to a script someone gave them and don't have a strong grasp of the law, the Rules, or sound trial practice.
- ❖ Generally, the Legal Paraprofessionals that have appeared before me have been prepared. I find that they are not as effective as attorneys, but I expect that given the difference in education and, in many cases, in experience.

- ❖ Some are excellent. Some are worse than the party representing himself or herself (unaware of rules, unaware of the law, not sufficiently familiar with the case, etc.).
- ❖ varies greatly between practitioner, just like lawyers. access to justice is good, more training re court procedures and decorum would be helpful
- ❖ Most of them do a fabulous job and I often forget that they are not attorneys.
- ❖ Most do a terrific job; some do not. But that is no different than attorneys who appear before me.
- ❖ The quality of the representation was fine. The paraprofessionals used by litigants primarily conducted document preparation.
- ❖ Most times they were very well prepared. However, often they would spend more time on topics that were not really relevant to the decision maker.
- ❖ The quality varies significantly from paraprofessional to paraprofessional. Overall, they can be helpful, but I would prefer if there was some oversight from a licensed attorney (somewhat like a physician's assistant in the medical field). I have concerns that in some cases, the litigant is unaware of the difference between attorney and paraprofessional representation.
- ❖ Opening up a path to representation for nonlawyers is making extremely quality representation available. Various persons with vast legal experience and understanding are now permitted to give the advice and appear in court after years of working in legal professions. Allowing nonlawyers to work within a legal arena they are qualified in is a huge benefit to the areas that are lacking in lawyers.
- ❖ Quality of representation typically varies, and that fact is no different with LPs. Some are better than others and a small percentage are of higher quality. Additionally, some LPs appear to require a deeper understanding of the limitation of the role undertaken; he/she is not a lawyer and there is a limited scope of the representation. Whatever the case, LPs who are familiar with the Rules and laws that apply to the issue being put before the Court and who are prepared to present that issue stand out as being of higher quality. That is not yet the norm.
- ❖ I believe Legal Paraprofessionals serve an important role in the legal profession, but need more training and should be licensed.
- ❖ The legal paraprofessionals who have appeared in front of me have been very well prepared and knowledgeable. In a rural community where attorneys are limited this is an excellent additional resource for families.
- ❖ Both parties in a dissolution matter involving children were well prepared and had a clear understanding of the issues in the case and the process.
- ❖ Quality still spotty, some very good and others need a lot more training and expertise
- ❖ The quality of representation in the courtroom is usually better than the quality of the representation in the filing of documents in the court.
- ❖ Quality overall is good. But, as noted above, I would like more mentoring of LPPs for understanding the practice or tone of court.
- ❖ Has been mixed favors positive experiences as long as they know the boundaries of their representation
- ❖ I have found the quality of representation by Legal Paraprofessionals to be high.

- ❖ Overall, I have been impressed with the quality of representation provided by LPs. They provide a valuable resource to help individuals who would otherwise be representing themselves in contentious family law proceedings. The assistance of the LP helps to streamline the process and avoid unnecessary hearings.
- ❖ The volume of my experience is limited, but the cases I have seen have been very professionally handled.

13. Please provide any additional comments or suggestions regarding the Legal Paraprofessional program.

- ❖ They should be held to the same ethical standards as the attorneys and there should be some sort of way to file complaints against them for the few that are not doing their job.
- ❖ The program could probably be expanded to include simple probate proceedings like appointing guardians and conservators or appointing personal representatives for an estate.
- ❖ There is no sign that the legal paraprofessionals will be any lesser in quality than the attorneys practicing in court. So far, they are more likely to better understand their specific arena than attorneys who have not practices either in the legal area or the local jurisdiction.
- ❖ I think that the LPPs take the SAME amount of time as attorneys representing clients.
- ❖ Legal Paraprofessionals have provided the same level of representation as attorneys in my family cases, and therefore, the options provided for more or less time weren't accurate.
- ❖ I have only had one legal paraprofessional represent a client in my courtroom and one who assisted an attorney in preparation for a settlement conference.

Legal Paraprofessionals

15. Since becoming licensed, approximately how many clients have you represented or served?

- ❖ As an LP probably 20 but decided not to litigate and go back to handling day to day paralegal stuff so being licensed probably 100
- ❖ 88
- ❖ 1
- ❖ 20 (x7 responders)
- ❖ 60
- ❖ 100 (x2 responders)
- ❖ 30 (x2 responders)
- ❖ 10 (x4 responders)
- ❖ 5
- ❖ 25
- ❖ 50
- ❖ Over 40
- ❖ 190
- ❖ 80
- ❖ None as of now
- ❖ 15 (x2 responders)
- ❖ 1 government agency
- ❖ I have a dual role and # is unknown
- ❖ I just got my license in late October 2024.
- ❖ 6
- ❖ Some are my clients, some I work on with other attorneys-so at least 100? Guessing here...
- ❖ 10 as an LP and counting. Still acting as managing paralegal for case with current atty until I build a caseload of my own. Drafting & court appearances for both caseloads.
- ❖ 75
- ❖ Over 150 clients
- ❖ Too many to count.
- ❖ 62
- ❖ 0
- ❖ Between 50 and 100
- ❖ 120
- ❖ 150
- ❖ 21
- ❖ Probably 75-100
- ❖ 7
- ❖ 3

22. Approximately, what percentage of your clients would have been self-represented?

5%	10%	15%	20%	25%	30%	40%	50%	75%	80%	90%
1	1	1	3	2	4	1	12	8	2	1

24. What is the top reason why you referred your client to an attorney?

- ❖ I have referred client's to an attorney if I felt I could not handle the case due to a large business and QDRO negotiations, etc.
- ❖ Beyond my capabilities or outside my allowable scope as an LP.
- ❖ QDRO (x2 responders)
- ❖ For Trial that is argumentative
- ❖ There was a business involved
- ❖ Nature of the issues or beyond the scope of my practice
- ❖ During discovery, it was found that the client or spouse owned a business that that to be dealt with; therefore as an LP, I had to refer them to a lawyer in the firm
- ❖ Have had to refer clients to attorney when there is a business involved.
- ❖ Some clients have complex financial matters (including Commercial business and QDRO) that I am not comfortable handling without help.
- ❖ The opposing attorney was extremely difficult to work with and habitually violated ethics, professional standards, and rules of procedure. I believed that a more experienced attorney would be better suited to address these issues and provide remedies.
- ❖ Juvenile issues, tied to closely with criminal issues, bankruptcy issues. I'm more or less concerned that there isn't much guidance on how to proceed in these areas since LPs aren't licensed or trained in them. Although they're all tied to domestic relations and under the same case number, until I have more experience, I just don't feel comfortable at knowing where the "line" is drawn.
- ❖ For cases that have to be litigated in Superior Court, I have one of the two law firms I'm affiliated with handle that.
- ❖ Representation needed was outside the scope of my LP license.
- ❖ Our firm has an attorney. We actively attempt to reduce our clients costs having the attorney focus on complex cases. We settle most of our cases outside of trial.
- ❖ I have chosen to only assist those who plan to obtain an uncontested divorce. If their case becomes contested, I refer them to an attorney or litigation LP within the firm.
- ❖ The percentage is actually less than 10% and actually only 2 I've referred out. I do not actively litigate evidentiary/trial cases. My focus is assisting parties in doc prep and settlement. So if a case is unable to settle, I refer out to my network of litigation attorneys. This limited scope role is discussed before setting the initial consult so as not to waste PC's time or consult fees if they no a matter is going to be highly litigious.
- ❖ Conveyance of business.

26. At what level or how much insurance do you carry?

Unknown /

Firm					
Manages	\$100,000	\$250,000	\$500,000	\$1 million	\$3 million
20	2	3	2	2	1

30. If applicable, what is your hourly rate?

Firm's Decision	\$175	\$195	\$200	\$205	\$225	\$250	\$265	\$275	\$280	\$300
1	1	1	5	1	8	15	2	5	1	1

31. If applicable, what is your flat fee?

Varies Depending Upon Type of Service	\$225	\$600	\$1500	\$2000	\$3000	\$4000	\$5000
6	1	1	1	1	1	1	1

43. What suggestions do you have to improve the exam process?

- ❖ None it was fine but difficult. More on process than laws
- ❖ I took it very early on. I've heard it's changed quite a bit in more recent times
- ❖ I took the test in 2021. It has improved since then.
- ❖ Better prep materials
- ❖ I think it would be beneficial to have better study guides available. When I tested, I found that the study materials were very broad which made it hard to know what to focus on when studying. Further, the study guides available when I tested were just two sample questions. I think it could be very beneficial to offer practice exams, similar to the practice exams available for the bar exam.
- ❖ A lot more guidance into study guides.
- ❖ Administration in Tucson
- ❖ Offer testing at additional locations around the state. Provide more study guides with sample testing questions. Make the test longer than 100 questions. Some of the specific areas of law cover some much materials to only have one or two questions on sessions is not enough.
- ❖ If I were to answer this truthfully, the survey would no longer be anonymous.
- ❖ Back when I took it, it was seamless. I think the exam itself could be modified but by now I'm sure that is happening since I was one of the early exam takers :)
- ❖ There needs to be a comprehensive study guide
- ❖ They were hard enough, all of the study guides (if not already done) need revised and adapted to provide a better chance of passing.
- ❖ A study guide with sample questions would be extremely helpful
- ❖ There needs to be a more comprehensive study guide and the test needs to be offered in places other than Phoenix.
- ❖ Offer it at an approved testing center so we don't have to travel. Also, provide instant feedback through electronic testing. Its also difficult to travel across the state to view the completed exam.

- ❖ No improvement needed.
- ❖ Make it easier to register for the exams.
- ❖ A better study guide.
- ❖ Example but applies to all... civil exam has 22% pass rate... something is wrong w/ exam for that low %... the differentiator might be experienced versus formal education?
- ❖ No changes. It was a challenge and an honor to pass.
- ❖ A prep course or sample exam or, at the very least, a set of reasonable sample questions.
- ❖ I took the test in the initial stages. Having a more focused study guide would have been helpful for family law portion. The study areas were very broad including juvenile law (which is separate from family law).
- ❖ Given the limited time to complete and retake exams, they should be more available
- ❖ Needs to be more comprehensive and challenging.

45. What comments or suggestions do you have to improve the application process?

- ❖ The application process I found to be pretty easy, just tedious, but that is to be expected.
- ❖ Not sure how to improve the timing, it takes a while from passing to approval
- ❖ I think more details need to be provided to applicants. Provide timelines for how long the process takes, send confirmation emails that applications were received and being reviewed. I think there is still a lot of confusion around the process and applicants
- ❖ It was easy and I don't have any suggestions for changing it.
- ❖ The prior LP director was not helpful at all and seemed to lack the knowledge and experience for valid candidates. The current LP director is amazing and I was lucky that he was the LP director while I finalized the remaining stages of my application.
- ❖ None. The investigator assigned to my application was extremely helpful.
- ❖ The persons who are assigned to handle an application need to be more productive. In my case the person assigned sat on my application -literally failing to do anything that was required- for so long that it would have been nearly 9 months waiting after the initial process was completed before being presented to the board. In fact the person was so brazen they wanted to hold up another licensure application that had been completed weeks prior so that he could present both simultaneously, which made no sense to me or his supervisor. Luckily I had someone who worked there that was able to intervene and avoid the unnecessary delay caused by one person's apathy.
- ❖ Process could go a bit quicker or have deadlines posted so applicants can expect to be on a certain board with an estimated approval date. Some folks have to put their careers on hold if they go the education route, so knowing when you'll possibly be licensed and employed again would have been nice.
- ❖ I passed both exams by early 2022, yet it took another 13 months to get through the character and fitness process so that I was not licensed until July 2023.
- ❖ The requirements could be better communicated. Notarized internship letter w/ bar # and 4 reference letters. Partially buried in 7-210. Should appear on website in bullet requirement summary. 2-3 letters is sufficient.

- ❖ Maybe beneficial to have an applicant start their application. My option was online in 2022. This may have changed. I was surprised with a few requirements that delayed the submission of my application.
- ❖ communication with the LP staff was always prompt and efficient
- ❖ Communication was sorely lacking.

46. How do you stay up to date on legal developments and industry trends?

- ❖ Others in my firm and emails from the State Bar.
- ❖ I attend CLE classes regularly
- ❖ CLE
- ❖ CLE's, Newsletters, LinkedIn, Colleagues
- ❖ CLEs, journals, magazines, etc...
- ❖ CLEs, subscription to case law updates, and I am on boards and committees.
- ❖ Attend CLE regularly; emails from professionals
- ❖ CLEs, Case law updates, professional development, newspaper, magazines
- ❖ Attorney/LP community and newsletters from Maricopa County Bar
- ❖ I read case law often, have open discussions within my firm, attend CLEs and try to participate in networking events.
- ❖ Attend CLEs, speak with my attorney friends at my firm and other firms, read updated case law, etc.
- ❖ MCBA
- ❖ CLE's, monitoring the statutes and reading court updates
- ❖ CLE's, local BAR association membership.
- ❖ MCBA and the State Bar
- ❖ I attend CLEs, subscribe to legal magazines and news letters. I talk to attorneys on a daily basis about legal changes and processes.
- ❖ CLE's, other professionals in the field.
- ❖ CLE, self-study/reading.
- ❖ CLE, seminars, magazines, etc.
- ❖ Online
- ❖ CLE, research on my own time and through other professionals.
- ❖ AZBAR CLE, subscription to ABA Journal and other resources.
- ❖ State Bar and legislative notices
- ❖ CLEs, publications, and research.
- ❖ CLE's, subscribe to court of appeals' opinions, researching case law for clients and sorting by newest
- ❖ Continued Learning Education courses, YouTube videos, Blogs, LinkedIn, Facebook groups, and networking groups.
- ❖ State Bar communications, CLE classes, legal research, reading news headlines, etc.
- ❖ Participation in CLE and meetings and conversations with firm colleagues.
- ❖ Arizona Attorney magazine, Maricopa Lawyer publication, CLEs
- ❖ CLE and community discussions with other legal professionals

- ❖ Attend CLEs, and review updates on case laws.
- ❖ CLEs. Community outreach and sharing with other LPs And attorneys
- ❖ Either I get the information from the firm I work with or other colleagues provide it for me.
- ❖ Member of the State Bar of Arizona. Member of the County of Maricopa Bar Association
- ❖ have a network of LPs and attorneys where we discuss changes, cases, rulings, etc.
- ❖ ongoing CLE through the state bar and my firm
- ❖ CLE, Professional Development events, seasoned attorneys in office.

47. What relevant workshops, seminars, or conferences have you recently attended?

- ❖ CLE by the Sea, Arizona State Bar Convention
- ❖ MCBA and ASBA cle
- ❖ Real estate in divorces
- ❖ Cliocon
- ❖ CLE by the Sea, For Better for Worse, several MCBA CLEs
- ❖ I attend Family Law Institute/For Better or Worse through the State Bar every year
- ❖ Family Case Updates, ethics,
- ❖ A few CLEs through the Maricopa County Bar
- ❖ Nothing recently.
- ❖ MCBA CLE's
- ❖ Spousal maintenance, ethical seminars, etc
- ❖ CLEs (State Bar and MCBA)
- ❖ Meet family court judges CLE with MCBA
- ❖ AGO sponsored seminars on family law
- ❖ Judges events and CLEs
- ❖ Maricopa County Public Defender's 2024 Mental Health Conference, AADCP's local seminar on Mental Health Courts. Office specific MVD training.
- ❖ My employer wanted me to attend this one. It is not in the family law area I am licensed in as a paraprofessional, but the attorney I work for does estate planning: Southern Arizona Estate Planning Council CLE on 8/9/2024: Estate and Gift Tax Returns
- ❖ For Better or For Worse
- ❖ Family Law Institutes, this month I'm attending the advanced Family Law CLE in Tucson.
- ❖ What can LPs do and not do (Pima County Bar), signed up for the upcoming Updates in Family Law at Hacienda del Sol
- ❖ I was recently admitted so I am beginning to attend professional seminars/conferences including the professionalism course.
- ❖ Trust/Billing CLE
- ❖ State Bar offered class on ethics
- ❖ Legal Paraprofessional summit at University of Arizona.

- ❖ For Better or For Worse CLE, MCBA Annual Paralegal Conference, and MCBA CLE events
- ❖ Red Rocks CLE February 2024 in Sedona for Personal Injury. Other various CLEs through the State Bar
- ❖ For Better or For Worse CLE and others.
- ❖ For Better or Worse, various online CLEs
- ❖ Family Law Institute: For Better or For Worse two-day CLE.
- ❖ February family law seminar in Phoenix- 3 days
- ❖ MCBA paralegal conference and the firm I work with does regular lunch and learns.
- ❖ CLE Tucson 11/15/2024
- ❖ Annual family law seminar - For Better or for Worse
- ❖ Advanced Family Law CLE
- ❖ MCBA CLE, and Meet and Greet

48. What additional training or resources would you like to see offered?

- ❖ More on criminal law. Seems we focus on family law
- ❖ I would love more options for recorded CLEs and veteran attorneys explaining day to day tasks that are easy once done, but intimidating when inexperienced
- ❖ Practical training for new paraprofessionals
- ❖ It could be beneficial to help pair new LPs with mentors that are willing to donate their time. I was thankful to work in a firm that works very collaboratively and they spent a lot of time helping me study and prepare for the exams and have been great resources while I have taken cases. However, I know that is not overly common so it could be really helpful to have some sort of program available for new LPs that do not have those kinds of resources available to them. This is particularly helpful because if you take the education path to get licensed, you do not get the significant exposure and experience you otherwise would in law school or by having had extensive experience.
- ❖ More detailed training and tutorials on Vlex/Fastcase and research tools
- ❖ Anything that lawyers learned in law school that we did not since we acquired out LP license through experience would be helpful. Most of the training is repetitive.
- ❖ More resources specifically for LPs
- ❖ We have many, which is great
- ❖ More education training for the Courts and the community. There is still confusion around the program and what services can be provided.
- ❖ CLEs on how to negotiate parenting plans and divorce settlements. Also, I am currently studying for the Juvenile paraprofessional exam. Training on how best to handle juvenile cases would be appreciated.
- ❖ someone to finally offer liability insurance.
- ❖ I think LPs and attorneys could benefit for more CLE on understanding retirement plans so they can better advise clients. I attend CPE as a CPA and CDFA on these topics but I have found that many attorneys don't understand the details enough to best advise their clients.

- ❖ More training on court room presences and presenting a case in court. There needs to CLEs just for LPs regarding these things.
- ❖ Trial and hearing preparation
- ❖ I would like to see courses or training resources that include court appearances both virtual hearings and in person trial/evidentiary hearings.
- ❖ More focused courses for LP specifically
- ❖ Study guide with example questions
- ❖ Unknown yet. Have only been licensed for a short time.
- ❖ I'm happy with the training and resources I'm currently involved in.
- ❖ More PI oriented classes...
- ❖ LP specific intro to litigating in front of judges, etc
- ❖ More information or training on appearing and litigating in court.
- ❖ More education opportunities in or near Yavapai County. Everything is in Phoenix and Tucson. So much of Northern AZ is being overlooked. Summer time is a good option for our Northern communities.
- ❖ trial preparation/witness testimony
- ❖ Trips!

49. What do you find most rewarding about your work as a Legal Paraprofessional?

- ❖ Having more authority to give answers than I did as a paralegal.
- ❖ I absolutely love people. I enjoy being able to shed some light in their life as much as possible during the hardest time in their life.
- ❖ Still waiting to answer this question
- ❖ Helping people navigate the legal system
- ❖ I love helping people
- ❖ Helping individuals
- ❖ When I was a paralegal, I worked for a certified family specialist. Nearly all of our cases were regarding the division of a community business and large estates. I know I was helping people then, but there is a notable difference when you help people who otherwise did not have the means or the voice to speak or defend him/herself. Mosts of my cases involve domestic violence and/or substance abuse allegations. The parties are, for the most part, lower income. Since I have my own practice, I have the ability to work with people to do much smaller and more reasonable payment options.
- ❖ The ability to effectively represent clients and provide them sound legal advice.
- ❖ Expanding my legal career and knowledge
- ❖ I love that I am able to offer legal services to those who otherwise may not be able to afford them.
- ❖ Helping people who otherwise could not afford good legal representation or may have tried to represent themselves.
- ❖ Seeing cases all the way through as counsel, providing thorough representation with empathy and care, something people don't get much anymore as seasoned attorneys seem

to get cold to things after years, helping Fathers receive proper representation and obtain recognition for the importance of their role in children's lives

- ❖ Helping others
- ❖ I LOVE being an LP. I have been in law a long time and just being able to complete a case from start to finish is amazing. Also, being able to help people handle their family law cases so they don't have to try to maneuver it on their own with the court's self-service forms.
- ❖ Helping good people go through the worst times of their lives
- ❖ Helping our government agency get child support for children. As an LP, I fill a growing gap of being able to fill a position that we have struggled in hiring an attorney in the public sector
- ❖ I can help people on various levels from paralegal work to representation
- ❖ Being able to help clients who are indigent and unable to get services elsewhere.
- ❖ I have been a senior paralegal for many years, and I am looking forward most to additional client contact and helping people move forward from difficult, emotional situations in which they find themselves.
- ❖ I love helping clients understand the process, educating them on financial issues (an area of expertise I have as a CPA/CDFIA) and helping with scenarios that in the end, often result in settlement.
- ❖ Helping people and finishing their action so that they can move on with their life
- ❖ Helping others who would not otherwise be able to access adequate legal representation due to their socioeconomic status
- ❖ being able to assist low income clients and bring resolution to their cases.
- ❖ Being able to practice law and help folks effectuate change/resolutions.
- ❖ Offering services to low income, and having the authority to represent the client in all facets
- ❖ The ability to help others.
- ❖ Achieving results for clients.
- ❖ Being able to help clients during one of the most difficult times in their lives and giving them a voice before the Court.
- ❖ Being able to help people who would otherwise have to pay big law one-third or more. My average fee is 20 to 25%.
- ❖ Helping others
- ❖ Being able to provide legal advice to my clients
- ❖ Helping others who otherwise couldn't afford it
- ❖ Being able to help clients and give them a better understanding of the law and their legal rights.
- ❖ Helping people who are lost in the legal process.
- ❖ The ability to assist those who cannot afford an attorney or do not want an attorney involved in their case (i.e., unconsted parties).
- ❖ I can represent clients who would otherwise represent themselves
- ❖ I've always enjoyed bringing realness and calmness to an otherwise emotional stage in my clients' lives.

- ❖ The ability to represent clients during some of their most difficult times
- ❖ It's an honor to be A LP! I find helping clients to be extremely rewarding.

50. What are the most significant challenges you encounter as a Legal Paraprofessional?

- ❖ Not all attorneys give the same respect to LPs as they would other attorneys.
- ❖ Dealing with rude and unprofessional opposing counsel
- ❖ Being used on my capabilities. I'm a retired police officer looking for a county attorney placement in justice courts.
- ❖ Many people are unfamiliar with the role and capabilities of an LP. Focusing on what an LP cannot do can detract from the extensive and valuable contributions an LP can provide. A clearer, more straightforward approach that highlights the positive impact and versatility of LPs would be far more effective in conveying their role.
- ❖ Getting simple answers to basic questions. Thankfully I have good colleagues, but most have been practicing about the same length of time as I have.
- ❖ Some attorneys are reluctant to talk to you because your name is not followed by Esq.
- ❖ Recently, the Court referred to me as a document preparer in the middle of a trial. It emboldens the other side while making my client feel they are not being fully represented. Recently a Court greatly minimized my client's claim for legal fees because "you hired a paralegal and you were overcharged."
- ❖ People mistaking me as a paralegal based on the title.
- ❖ People understanding who we are and what we do.
- ❖ Attorneys understanding the license
- ❖ The most significant challenge is teaching people to differentiate a Legal Paraprofessional from a paralegal. Most people use the terms interchangeably and do not recognize they are different roles that offer different services. It would be easier if the LP was referred to as a Legal Practitioner instead so that people could associate it similarly to a Nurse Practitioner.
- ❖ Respect from attorneys in the community.
- ❖ A few other seasoned opposing counsel may resent my ability to sit next to them as an equal in the courtroom
- ❖ Nothing yet
- ❖ Dealing with the Courts on what a Legal Paraprofessional is and having to explain that we are not paralegals and ARE to be listed on court dockets and that we have a law license and can represent our clients, being excluded from hearings because the judge/commissioner or their staff isn't trained to know that we can and do represent clients. and being embarrassment in front of our clients. Explaining to client's that I am not an attorney, but I represent them and have a bar license just like an attorney, and they still try to call me their attorney. The outside world has no idea what a Legal Paraprofessional is. They know what a nurse practitioner is but not an LP. Having opposing attorneys and courts call me counsel but I am not allowed to be counsel. Some attorneys will not provide you with any respect because you are a "glorified paralegal".

- ❖ Dealing with condescension from attorneys. Having to daily explain my role to clients, opposing counsel/party, and even court staff and judicial officers.
- ❖ I'm familiar with the local JP Courts and the staff. When I've stopped in to renew friendships and told them that I'm an LP now I usually get blank stares. After I start to explain the program their memory gets jogged and they say " Oh. Yah."
- ❖ Currently, very few people know what an LP is or does.
- ❖ Attorneys who don't like the LP Licensure can be difficult to deal with
- ❖ Misunderstanding around what services we can provide.
- ❖ As a new paraprofessional, my most significant challenge is learning the protocol for appearing in court, how different types of hearings are held and the like. Other paraprofessionals report that judges are very accepting of paraprofessionals but some attorneys are not. The attorney I work for is mentoring me on protocol for court appearances, but some type of training class or webinar would be extremely helpful, especially for those of us who have not been to law school and are licensed under the "experience" path.
- ❖ I think there are still some out there in the professional community that do not understand what LPs can and cannot do. In some cases they are seen as 'less than'. What has helped me is that I came into this field already with a history as an expert witness with other credentials.
- ❖ Lack of time arguing in court and arguing case law.
- ❖ Explaining to other legal professionals what a LP is
- ❖ At times, it appears that an LP is held to a higher standard in courtrooms than an attorney. Some individuals have a clear prejudice against LPs.
- ❖ Earning my place amongst some attorneys and establishing my practice amongst established law firms.
- ❖ Trial experience
- ❖ The lack of respect from attorneys. Many treat you as though you are ignorant and easily bullied. They tend to fail to adhere to the rules of procedure while demanding that you do. Many tend to attempt to belittle your abilities (i.e., scope of practice) to the court, which forces you to provide information to the court in regard to the scope of practice. This is rather annoying considering the scope of practice is explicitly laid out by the Supreme Court and it causes clients to panic.
- ❖ Courts are overloaded with cases and refuse to enforce disclosure and discovery. The less wealthy clients can often only rely on Rule 49 and 65 of the ARFLP and when opposing doesn't comply with those, they can't always afford to engage in extensive discovery. The court should do more than just say they "waived" the issue but not conducting discovery. The family law rules are not the civil rules and although family law sanctions are available immediately, attorneys fees and sanctions are rarely enforced.
- ❖ The most significant challenges I've encountered as a LP is opposing counsel underestimating my ability to represent my client's positions to the Court.
- ❖ Right now, it is [REDACTED], who thinks that I'm not capable of representing clients, and they ignore my rep letters. I will likely have to file suit on one or more cases before they start taking me seriously.

- ❖ People not understanding an LP's role
- ❖ Being taken seriously by attorneys or spoken to in a condescending way by attorneys
- ❖ Some attorneys do not respect legal paraprofessionals, and it can be challenging gaining the respect from attorneys because of this.
- ❖ Limited info on how to start private practice.
- ❖ I am not a paralegal. Explaining that the definition of paraprofessional and how it does not apply to my license or qualifications and that I'm not a certified or specialized paralegal. This applies to clients, attorneys, judicial staff and even judges. This is a daily occurrence in one or some of the foregoing. Our title needs to be changed. I support several proposals. "Para" should not be included. Maybe Limited Family Law Practitioner (LFLP) or Limited ____ Law Practitioner?
- ❖ Knowledge of the public of our existence.
- ❖ obtaining clients
- ❖ The public and court's not fully understanding our role. even opposing attorney's sometimes are still unsure of what our scope is
- ❖ not being respected as an equal by some opposing counsels
- ❖ A general lack of respect from attorneys who are unfamiliar with the demands of the licensing process
- ❖ Setting expectations on what services an LP can provide and the benefit over hiring attorneys at times.

51. What additional suggestions or comments do you have to improve the Legal Paraprofessional program in Arizona?

- ❖ Make attorneys realize we are not paralegals
- ❖ There needs to be clear guidance on what an LP can and cannot do, but it mustn't be so restrictive that it undermines the purpose of the LP license. Public awareness about LPs and the scope of their role is equally important. Other states have implemented similar programs, but Arizona's is the most effective and, in my view, sets the standard nationwide. Arizona has done a fantastic job with a difficult task! I am proud to be part of the LP program!
- ❖ New paraprofessionals should be required to be supervised for at least a year. I have encountered difficulties settling cases mostly with paraprofessionals because they do not know the law and their stance is based on what they feel is right, not what the parties are entitled to under the law.
- ❖ They should change the name to Legal Practitioner, the same as you have nurse practitioners in the medical field. Legal Paraprofessional is confusing to people
- ❖ I think that improving the study materials, offering a mentor program and considering changing the title would elevate the program.
- ❖ Get the word out so people know this program is available to them.
- ❖ PLEASE provide the Court staff information to recognize a Legal Paraprofessional's role. It has been almost three years since I have been licensed and some of the court dockets show me representing my clients and other dockets say my client is Pro Per. I had a case recently where the opposing attorney filed a Motion to Dismiss and I was not notified.

Would love our license to be changed from Legal Paraprofessional to Legal Practitioner or some other name that an everyday person could understand our roles.

- ❖ Get more information out on LP and their roles.
- ❖ The education route needs to have more requirements for experience/training. LPs with no real working experience as Paralegal who went the education route have no clue
- ❖ More surveys like these, to be able to provide feedback. A more outline system for LPs to make requests for clarification. More information on how to make requests for changes to the LP process.
- ❖ I am excited that this program has been made available. After working in the field of law for so many years, I am excited to further my career and be able to help clients directly. My employer is the one who suggested and encouraged me to pursue the paraprofessional path, and I am so glad that I did.
- ❖ The Family Law test could include more questions about the child support guidelines and maybe include some knowledge about case law. From what I recall, there were a number of questions about prenups. While it is important to know about prenups in family law, they are not a key subject for the LP target demographic.
- ❖ Add'l exam questions related to finances as I believe that LPs should have a deeper understanding of retirement and investments before they give advice. Also, more exam practice questions so you don't study the wrong areas in too much detail (I studied lots of con law and it wasn't covered much).
- ❖ There needs to be a stronger emphasis on court hearings and trials. I feel that since I was a certified paralegal, that I have had to learn how to actual manage a hearing or trial. There needs to be CLEs for LPs that are about court presence, arguing and how to maintain as much control of your part of the hearing as possible.
- ❖ Additional CLEs and vocational training, more networking events, greater public outreach
- ❖ I would like to see other specialization areas such as probate & QDRO preparations.
- ❖ More community education as to what an LP is and does throughout the state.
- ❖ Review class or talk discussion when an exam is failed
- ❖ There needs to be a concerted effort made by the state to educate the public, attorneys, and the courts about what LPs are and can do. Most law firms would not hire me due to lack of experience as a paralegal as they tend to hire LPs as paralegals, which is why I opened my own practice.
- ❖ The public needs to become more aware of the program. They think we're just paralegals and dismiss us. Change our profession to be called something else! Google data will show that people only search "Attorney" or "Lawyer" and they never search for LPs because they don't know. I've also had consultations vent to me about another firm "blowing them off" for just sending their "paralegal" when I know for a fact it was an LP.
- ❖ For LPs that are coming into the field through education in LP courses, they need resources to find work and gain legal experience PRIOR to representing clients on their own.
- ❖ Make it easier to register for other exam areas.
- ❖ Additional resources or CLE preparing LP for trials and court appearances.

- ❖ The experience requirement to test for the program should be longer than 10 years. Without education - one should have at least 20-25 years as a paralegal in order to test.
- ❖ I almost would like there to be an oversight committee about applicants. If I recall, when attorneys seek Judge Pro Tempore status, there is input from their peers as I remember an attorney I worked for said for the first time she had not recommended a proposed attorney for JPT. I know there are quite a few paralegals that have been approved that many LP's/attorneys have been on the opposing side of cases. It does worry me that some of these individuals are or can be practicing without any attorney oversight given firsthand knowledge of their legal experience, work ethic, work product, etc., and it makes me concerned of the future of our license with potential complaints.
- ❖ I would like to see an LP newsletter or something similar
- ❖ Offer more certifications, trust and estates, wills.

52-53. Overall, how would you rate the customer service and communication received from the Certification & Licensing Division?

- ❖ Haven't heard from them.
- ❖ I am incredibly grateful for the Certification & Licensing Division. Their prompt, professional responses and guidance have been invaluable. Managing this division is no small task, and I truly appreciate having their support.
- ❖ the people at the licensing and certification division were beyond helpful and professional. I wrote to their supervisor to inform of that as well, they were as excited as I was to move forward and get license
- ❖ There to patiently answer my questions.
- ❖ I am always getting emails and updates which is great.
- ❖ I felt that I had to send multiple emails before receiving a response. When a response was provide it was clear that there was an outlined process that was not available on a website. Make the website, materials, and information for available to LPs and the public.
- ❖ My emails were answered promptly and in particular Mark McCall was extremely helpful.
- ❖ As I mentioned prior, the rating goes to the current LP director and his staff who were very kind and knowledgeable while they assisted me with my application.
- ❖ I like that Mark and everyone either answers their phones and emails quickly or gets back to folks reasonably.
- ❖ It is extremely difficult to reach a staff member. However, I do understand that during the time my application was submitted, they were short staffed. That issue was resolved after hiring an investigator.
- ❖ The person handling my application did not answer the phone, return voice messages, and ignored emails. He held my application in limbo for no apparent reason. I had to seek additional help within that office to have my application presented to board. It was an extremely frustrating experience, which was compounded by the fact that had I voiced this frustration odds were my application would have been held longer or recommended for denial.

- ❖ Forms that were sent out were confusing because they came from the bar and said to contact the bar, despite CLD being the proper contact. Sorry, but I forget the details. It was the forms sent right after the board approved me for licensing.
- ❖ The services and communication I have received from the Certification & Licensing Division have been nothing short of outstanding. It's amazing to have such a supportive group of people working to educate the legal community about LP services and provide guidance through the licensing process. Thank you all!!
- ❖ Generally, good communications and helpful staff.
- ❖ Communication was quick and efficient
- ❖ Mark is OUTSTANDING!!!! Deserves promotion, raise and bonus. Application website is clunky at best. Designed using 20+ year old standards.
- ❖ Everyone at licensing was communicative and helpful.
- ❖ Communication has always been excellent even in the beginning stages of this license when a lot was still new and unknown. Appreciate all of the LP staff members
- ❖ Everyone was extremely professional and kind.
- ❖ Mark McCall and his staff are great, keep it up.



Legal Service Innovations

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