

PARALEGAL DIVISION OF THE UTAH STATE BAR
BOARD MEETING MINUTES
July 13, 2021

12:01 p.m. Shalise McKinlay calls the meeting to order. The following attendees are present:

| <u>Via Zoom</u> |
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| Shalise McKinlay |
| Tonya Wright |
| Katie Lawyer |
| Kathryn Shelton |
| Jennifer Hunter |
| Rheane Swenson |
| Cheri Christensen |
| Tally Burke-Ellison |
| Julie Eriksson |
| Peter Vanderhooft |

Excused:
Lexi Balling
Shari Dirksen
Suzanne Potts

Chair – Shalise McKinlay welcomes the new board at 12:04 PM

General Updates and Discussion

Shalise prompts everyone to begin thinking about brown bag CLE ideas and submit suggestions. The Division should schedule a meeting with UPA for Paralegal Day (October/November).

Shalise suggested that the Division begin issuing quarterly newsletters to members. Some ideas for materials include member spotlights, member events etc.

Shalise mentioned that the Division begin brainstorming community service event ideas.

Rheane is working on edits to previous meeting minutes. Approval votes on the May minutes need to be tabulated, but the final minutes should be ready to circulate. Rheane is currently working on edits to the June minutes.

Cheri provided an update on paralegal training. The issue of annual membership forms was brought up. Tonya noted that there is an issue with LPPs regarding their CLE reporting as this is done through the Bar. Julia mentioned that there is also an issue with Form C as LPPs do not require supervision. Rheane mentioned that the forms may also be problematic for LPPs that hire Paralegals and the forms do not contemplate LPPs as supervising paralegal work. Kathryn mentioned that the form could be updated to include a check box for LPPs and that the supervising attorney affidavit requirement could be removed and that the updates should be run through the Bar. Cheri also mentioned that the forms are problematic for Utah paralegals that are supervised by attorneys that are not licensed in Utah. Tonya indicated that she will contact Scotti Hill about this form and Cheri offered to provide a redline of Form C-1 to the Board for review.

Tonya brought up the issue of LPPs as part of the Paralegal Division and if there would be a point when LPPs may decide to create their own division. The Board discussed insurance liability for LPPs and that the issue of LPPs creating their own division should be addressed with Scotti Hill.

Membership:

N/a

Education: Julie Erikson and Kathryn Shelton

There is a conflict with the September brown bag with another event at the Bar and the event has been moved to the third Wednesday of September.

The June seminar in 2022 conflicts with Juneteenth. The Board discusses whether the date should be moved and determines that the date should be moved earlier to not conflict with the Bar renewal deadline. Kathryn will confirm moving the date earlier.

There is no new update regarding the upcoming convention meeting.

Shalise mentioned the possibility of starting a newsletter that will include an education section with upcoming CLEs. Will discuss more with and confirm with Cheri Dirkson.

Julie indicated that this would be a good format to include “save the date” reminders as well as legislative updates. Shalise added that changes to the Rules, especially rules related to discovery could be included. Katie suggested that a CLE could be created discussing the recent Rule 45 changes.

Tonya highlighted Greg Waymant’s articles in the Bar Journal

Upcoming dates:

Paralegal Day May20 , 2022, June 10, 2022

September 15



Ethics and Professional Standards/Utah Paralegal Association Liaison :

Community Service Report:

Jennifer is waiting on an update and will have a separate meeting with Shalise and Tonya to get in touch with Angie.

Tonya mentioned doing community hours with young lawyers; contact Grant Miller – Wills for Heroes.

Past examples of community service events include: clothing and food drive for Food Bank and Roadhome; money for medical service providers (COVID outreach); delivery pizzas to healthcare workers to the University of Utah; or gift cards to people that were affected by COVID.

Marketing:

N/a

Finance Report:

Tally stated that financials were sent out on July 12, 2021.

Bar Commission Report:

Nothing new to report. Tonya will give an update at the next meeting

UPL Committee:

N/a, no new cases

Nominations/Parliamentarian:

N/a

Open Floor:

Tonya requested information about the reimbursement instructions. Tally will send out the reimbursement form and stated that checks are issued on the 15th and 25th of the month. Tonya notes that there is a change to mileage reimbursements. Both the receipt and total mileage travel needs to be provided for a reimbursement.

Reminder that the paralegal retreat is on September 10-11, 2020 in Heber City. There will be a pool party and everyone is to send any special food requirements, such as vegetarian or allergies to Shalise in advance of the retreat.

12:40 PM – Julie motions to adjourn, Katie seconds. Meeting adjourned.



/s/Peter N. Vanderhooft

Peter N. Vanderhooft, Secretary