

PARALEGAL DIVISION OF THE UTAH STATE BAR
BOARD MEETING MINUTES
August 20, 2022

10:34 AM Katie Lawyer calls the meeting to order. The following attendees are present:

<u>In Person</u>	<u>Excused</u>
Katie Lawyer Alex Vaka'uta Cheri Christensen Julie Eriksson Lexi Balling Liberty Stevenson Melissa Parache Nacia Franco Peter Vanderhooff Shalise McKinlay Shari Dirksen Stefanie Ray Suzanne Potts	Jennifer Welsh

General Updates and Discussion

Katie Lawyer welcomes the Board to the annual Board Retreat.

Katie Lawyer goes over the Paralegal Division Board of Directors packet and discusses the roles and responsibilities of the Board Members.

Stefanie Ray motions to approve the July 2022 minutes, Shari Dirksen seconds. The motion passes.

Membership:

Cheri Christensen notes that there is still an issue with membership applications - new and renewing members - not being forwarded to the Division from the Bar's online portal, and that she is working with the Bar to resolve the issue. Cheri Christensen indicates that the issue likely occurred when the member renewal fee change was implemented.

Shalise McKinlay suggests calling a meeting with the Bar to meet in person with the IT Department. Katie Lawyer will follow-up with Diana Gough and David Clark.

Shalise McKinlay discusses the need for an updated listserv of Paralegal Division Members.

Cheri Christensen discusses an issue with an application submitted by Adriana Vallarta to the Paralegal Division. The Board discusses the application. Suzanne Potts motions to approve Adriana Vallarta's application to the Paralegal Division and Stefanie Ray seconds. The motion passes.

Katie Lawyer discusses the supervising attorney requirement for membership in the Paralegal Division and discusses the impact on remote and out-of-state applicants. The Paralegal Division Bylaws state that members need to be supervised by a Utah licensed attorney. However, there is a recent trend of applicants from national firms and paralegals who are only supervised by attorneys who are licensed

outside of the State of Utah. The Board discusses a potential change to the Bylaws and the potential impact that a change may have regarding unauthorized practice of law. Shalise McKinlay recommends tabling the issues until the next Board meeting in order to further research the issue, and Cheri Christensen concurs. Shalise McKinlay recommends reaching out the Bar regarding non-Utah licensed attorneys.

Katie Lawyer concludes the discussion by stating that the current applicants who are affected by not having a Utah licensed attorney supervise their work be given an update that their applications have been received but that the Board is working with the Bar to further discuss the parameters of the Bylaws.

Education:

Julie Eriksson notes that she has the following dates for upcoming brown bags, Paralegal Day, and the Paralegal Division Annual CLE:

- First Brown Bag: September 14, 2022
- Second Brown Bag: November 9, 2022
- Third Brown Bag: January 11, 2022
- Fourth Brown Bag: March 8, 2022
- Paralegal Day: May 18, 2022
- Annual Paralegal Division CLE: June 16, 2022

Julie Eriksson discusses that the venue for Paralegal Day is still TBD. The Board discusses potential venue options.

Katie Lawyer discusses CLE options and the availability of continuing remote access to CLEs to increase participation to members who are unable to attend in person. Katie Lawyer also requests that the Board Members and Paralegal Division Members provide feedback on potential CLE topics in order to cover a variety of specialties. Katie Lawyer requests that suggestions be submitted to Julie Eriksson and the Education Committee to provide topics and potential speakers.

Alex Vaka'uta discusses including environmental law CLEs and Peter Vanderhooft discusses including a CLE on the new ODR system for Small Claims.

Julie Eriksson indicates that she is working on a schedule for the Education Committee meetings. She proposes scheduling the meetings every two months and setting the first meeting to brainstorm CLE ideas and the second meeting to solidify the details for the CLE.

Katie Lawyer discusses virtual brown bag CLEs, and Julie Eriksson indicates that brown bags will continue to have a virtual option. Julie Eriksson also discusses sending CLE announcements to lawyers to get them involved with the Paralegal Division CLEs.

Julie Eriksson notes that there is a need to schedule a keynote speaker for Paralegal Day. Stefanie Ray will reach out to Kirk Jowers. Katie Lawyer reminds the Board that additional help from Board Members will be required to set up for Paralegal Day.

Julie Eriksson discusses sponsoring a speaker for the Fall and Spring Conventions. Julie Eriksson discusses including the use of paralegals and Licensed Paralegal Practitioners in family law practice for the Fall Forum and discusses setting up a panel of two attorneys and two LPPs.

Ethics and Professional Standards/Utah Paralegal Association Liaison:

No updates.

Community Service Report:

Shalise McKinlay will give Wills for Heroes box to Liberty Stevenson. Shalise McKinlay discusses Wills for Heroes and notes that the Young Lawyers Division runs the program for first responders and how the Paralegal Division provides notary support and discusses the process with clients.

Katie Lawyer discusses potential opportunities for community service projects and scheduling a mixer with court clerks and Paralegal Division Members. Potential events include:

- Working with the Rocky Mountain Innocence Project
- Setting a clothing drive to assist domestic violence survivors
- Working with the Community Justice Center to assist domestic violence survivors

Shalise McKinlay also discusses the mixer event and discusses the need for Committee involvement to review issues related to the venue, costs, advertisements and potential collaborations with the Legal Aid Society. Peter Vanderhooft discusses the proposed family law CLE mixer and the potential to hold the mixer outside of Salt Lake County. The Board discusses the potential of holding the mixer in Utah County.

Marketing:

Lexi Balling is staying on as the Social Media Chair and requests that Board Members provide prompts and materials for posting to the Division's social media pages. Upcoming events that will need to be posted include the upcoming brown bag CLEs and Wills for Heroes events.

Katie Lawyer discusses potential copyright issues from the Paralegal Division Annual Meeting and indicated that she is working on a follow-up response. Shalise McKinlay discusses the need to add a disclaimer during CLEs that Paralegal Division CLEs are not for reproduction.

Shari Dirksen indicates that she does not have any updates.

Finance Report:

Melissa Parache discusses the Division's financials and has provided a report to the Board Members. Cheri Christensen and Katie Lawyer discuss the budget and opportunities to utilize the Division's budget. Peter Vanderhooft discusses opportunities to provide scholarships for members to attend brown bags and Division CLE events and set up regular sponsorships. Shalise McKinlay discusses reaching out to Division members to gather input on additional events that would be of interest to the members.

Melissa Parache discusses outreach to schools and paralegal programs and Katie Lawyer discusses mentorship opportunities with Salt Lake Community College and Ensign College students. Katie Lawyer will follow-up with Kelsey Larsen and Shalise McKinlay to build upon work done by the previous Paralegal Division Board. Cheri Christensen discusses scheduling events with paralegal students to discuss the benefits of becoming members of the Paralegal Division.

Bar Commission Report:

No updates

UPL Committee:

No updates

Nominations/Parliamentarian:

No update

Open Floor:

Katie Lawyer reminds the Board that the monthly Paralegal Division Board Meetings are held on the second Tuesday of the month.

At 12:05 PM Peter Vanderhooft makes a motion to adjourn the meeting. Cheri Christensen seconds the motion. The meeting is adjourned.

/s/Peter N. Vanderhooft

Peter N. Vanderhooft, Secretary

