

ASSESSING ARIZONA'S LEGAL
PARAPROFESSIONALS:

2024 PROGRAM SURVEY

Data and Comments
Appendices



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Appendix A – Questions and Response Data

Clients

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| 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%) |

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| | 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%) |

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| 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

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| 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. |

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| | | <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> |

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| 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

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| 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%) |

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| | | <p>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%)</p> |
| 3 | What level is your court? | <p>Municipal=11 (21%) Justice of the Peace=5 (10%) Superior=36 (69%)</p> |
| 4 | For what type of cases have you seen a Legal Paraprofessional represent clients in your court? | <p>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</p> |
| 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? | <p>Strongly agree=16 (39%) Agree=20 (49%) Neither agree nor disagree=1 (2%) Disagree=2 (5%) Strongly Disagree=2 (5%)</p> |
| 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? | <p>Strongly agree=28 (68%) Agree=9 (22%) Neither agree nor disagree=2 (5%) Disagree=2 (5%)</p> |
| 7 | Based on your experience do you think the LPs required additional training or support? | <p>Yes=21 (53%) No=19 (47%)</p> |
| 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 | <p>More time=16 (42%) Less time=22 (58%)</p> |

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| | 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

| | | |
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| 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%) |

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| | | <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 |

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| | | ❖ 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%) |

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| | | 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 |

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| | | <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%) |

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| | | <p>Mediation=1 (2%) Trial Verdict=2 (5%) Directed Verdict=1 (2%) Other=8 (18%)</p> <ul style="list-style-type: none"> ❖ Plea ❖ Evidentiary hearing ❖ Final judgment or Order of the Court |
| 28 | How do you charge for services? | <p>Pro Bono=3 (6%) Hourly Rate=39 (74%) Flat Fee=7 (14%) Other/Contingency Based=4 (8%)</p> |
| 29 | If you charge for services with multiple or various rates, which is most common? | <p>Hourly Rate=35 (92%) Flat Fee=1 (3%) Other / Contingency Based=2 (5%)</p> |
| 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? | <p>\$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%)</p> |
| 33 | Your clients identify as | <p>Female=33 (40%) Male=32 (39%) Transgender=5 (6%) Nonbinary=3 (4%) Prefer not to say=6 (7%)</p> |
| 34 | Your clients are | <p>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%)</p> |
| 35 | With which ethnic background(s) do your clients identify? | <p>White/Caucasian=28 (22%) Asian=12 (9%)</p> |

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| | | <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> |

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| 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 |

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| 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 | \$100,000 | \$250,000 | \$500,000 | \$1 million | \$3 million |
|----------------|------------------|------------------|------------------|--------------------|--------------------|
| Manages | | | | | |
| 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/CDFAs) 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 a 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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Appendices A & B