



# MINNESOTA JUDICIAL BRANCH

## Legal Paraprofessional Pilot Project Implementation Committee

### Meeting Summary

August 19, 2019 | 1:00 pm – 4:00 pm

| #  | Topic                                    | Facilitator(s)                             |
|----|--|--|
| 1. | <b>Welcome &amp; Guest Introductions</b> | <b>Justice Thissen<br/>Judge Rodenberg</b> |
| 2. | <b>Review and Discussion on Survey</b>   | <b>Justice Thissen<br/>Judge Rodenberg</b> |

A couple of people tested the survey before the meeting. Comments overall are that it looks like a good start.

Discussion among the committee members about the goal and purpose of the survey. Some suggestions for clarification were offered and ideas about possible other questions were also discussed. A question was raised about whether the pilot is limited to the three areas of law outlined in the order. Answer: Yes. The order is not meant to leave the project open to other areas of law.

Additional discussion about how the committee can let those individuals who are creative and entrepreneurial minded know that the committee wants to hear from them and their ideas. Possible structures around non-traditional practices such as unbundled and flat-fee services.

Distribution: To all licensed attorneys in the state of MN. Paralegal representatives on the committee will also forward it to paralegal association members.

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|-----------|---|--|
| <b>3.</b> | <b>Review and Discussion on draft RFP</b> | <b>Justice Thissen<br/>Judge Rodenberg</b> |
|-----------|---|--|

Building off the suggestion at the June meeting to consider drafting and releasing a request for proposal type document to solicit project ideas and participants, the committee reviewed a draft RFP.

After discussion, there was general agreement that the RFP concept would be more helpful if some project parameters and criteria were already established before seeking ideas and participation. There was concern that sending out too broad of a request could inhibit proposals because it would be too vague.

Distribution: Same/similar to survey distribution maybe. Will consider needs and options when the time is closer.

What parameters need to be set in advance?

- Level of supervision and what does it look like (contract, rules, etc.)
- Education and experience level of the people doing the work (attorneys and paralegals)



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- Malpractice insurance coverage (what is needed to ensure this coverage?) How does this fit or not fit with public attorneys (such as county attorneys, public defenders, etc.)?

Sub-groups were established to work on drafting a proposed set of qualifications for the two groups who will engage in the work; paralegals and supervising attorneys. Sub-groups were asked to develop recommendations for review at the September meeting.

## 4. Adjourn

Next meeting:

- Review the proposals for the expectations and qualifications
- Overview of the unauthorized practice of law (Rule 5.8)

## Member Roster & Attendance

- |                                     |   |                                   |
|-------------------------------------|---|-----------------------------------|
| <input checked="" type="checkbox"/> | Justice Paul Thissen  | Co-Chair                          |
| <input checked="" type="checkbox"/> | Judge John Rodenberg  | Co-Chair                          |
| <input checked="" type="checkbox"/> | Thomas Nelson   | MSBA                              |
| <input checked="" type="checkbox"/> | Sally Dahlquist   | Inver Hills Community College     |
| <input checked="" type="checkbox"/> | Maren Schroeder   | Rochester, MN                     |
| <input checked="" type="checkbox"/> | Tiffany Doherty-Schooler  | Duluth, MN                        |
| <input checked="" type="checkbox"/> | Pamela Wandzel  | Minneapolis, MN                   |
| <input checked="" type="checkbox"/> | Christopher O. Peterson   | Minneapolis, MN                   |
| <input checked="" type="checkbox"/> | Bridget Gernander   | State Court Administrators Office |
| <input checked="" type="checkbox"/> | Liz Reppe   | State Law Library                 |
| <input checked="" type="checkbox"/> | Guests:   |                                   |
|                                     | ▪ Emily Eschweiler, MN Board of Law Examiners                   |                                   |
|                                     | ▪ Susan Humiston, Office of Lawyers Professional Responsibility |                                   |
|                                     | ▪ Steve Marchese, MSBA  |                                   |
|                                     | ▪ Sarah Welter, SCAO Research Analyst                           |                                   |
|                                     | ▪ Melissa Kantola, SRL Manager                                  |                                   |