

**PARALEGAL PRACTITIONER  
STEERING COMMITTEE  
MEETING**

**Minutes  
Thursday, February 18, 2016  
Executive Dining Room  
Matheson Courthouse  
Salt Lake City, Utah**

**JUSTICE DENO HIMONAS, Presiding**

**ATTENDEES:**

Justice Deno Himonas, Chair  
Jacqueline Morrison for Dean Robert W. Adler  
John Baldwin  
Allison Belnap  
Adam Caldwell  
Mary Jane Ciccarello  
Terry Conaway  
Sue Crismon  
James Dean  
Julie Emery  
Judge Royal Hansen  
Dixie Jackson

**STAFF:**

Tim Shea  
Jody Gonzales

**ATTENDEES:**

Jim Jardine  
Scott Jensen  
Steven Johnson  
Comm. Kim Luhn  
Ellen Maycock  
Daniel O'Bannion  
Monte Sleight  
Judge Kate Toomey  
Elizabeth Wright

**EXCUSED:**

Thomas Clarke  
Robert Rice  
Senator Stephen Urquhart

**GUESTS:**

**1. WELCOME AND INTRODUCTION OF MEMBERS: (Justice Deno Himonas)**

Justice Himonas welcomed everyone to the meeting. He mentioned that a few committee members were unable to attend.

Members of the committee introduced themselves.

Mr. Shea highlighted the following regarding the meeting: 1) it is a public meeting, 2) the audio recording and minutes will be posted to the Public Notice Website, 3) the approved minutes and material will be posted to the committee webpage (URL noted on the agenda), and 4) the meeting schedule for several months is noted on the agenda.

**2. COMMITTEE CHARGE: (Justice Deno Himonas)**

Justice Himonas highlighted the four areas for consideration by the steering committee: 1) answer the questions the task force did not have time to resolve, 2) develop the administration and curriculum to meet the education requirements, 3) develop the regulations and administration for licensing, and 4) develop measures for success.

### **3. REVIEW TASK FORCE REPORT AND RECOMMENDATIONS: (Justice Deno Himonas and Tim Shea)**

Justice Himonas highlighted the following information about the formation and work of the Supreme Court Task Force to Examine Limited Legal Licensing:

- 1) Washington State's Limited Legal License Technician Program;
- 2) the draft resolution of the ABA Future's Commission urging the high court in each state to examine the feasibility of a similar model;
- 3) the Utah task force began meeting in June 2015;
- 4) makeup of the task force membership was noted;
- 5) two subcommittees were formed to evaluate the Washington State program, and other models nationwide;
- 6) development of a white paper by Thomas Clarke of the National Center for State Courts (NCSC) entitled Non-Lawyer Legal Assistance Roles: Efficacy, Design, and Implementation;
- 7) address access and affordability for civil justice matters; and
- 8) the recommendation for a licensed paralegal practitioner, with the appropriate education, testing, and certification to provide specified services in the areas of: a) family law, b) landlord/tenant, and c) debt collection.

Mr. Shea provided details of the task force recommendations:

- 1) recommendations to the Judicial Council for a variety of initiatives that the judiciary may take under existing rules, not for consideration by the steering committee;
- 2) the paralegal practitioner will qualify after meeting the minimum education, examination, and licensing requirements;
- 3) practice areas and tasks of the paralegal practitioner were identified by the task force;
- 4) the rule proposed by the task force, to include the proposed authority of the paralegal practitioner, was noted;
- 5) an outline of the necessary education and testing for the education component for the paralegal practitioner was identified the task force;
- 6) the paralegal practitioner program will be administered through the Utah State Bar;
- 7) topic areas for the steering committee to consider were prepared by the task force;
- 8) the task force recommended that the steering committee consider the existing regulations for lawyers as a starting point for discussion;
- 9) ABA Resolution 105 was adopted by the ABA Board of Delegates at their Mid-Year Meeting two weeks ago; and
- 10) the principles of the resolution and experience gained by other states studying similar models were used by the task force.

### **4. SUBCOMMITTEES: (Justice Deno Himonas)**

Justice Himonas highlighted the steering committee subcommittees to include:

Education Subcommittee: Robert Adler, chair; Allison Belnap, vice chair; Adam Caldwell; Teresa Conaway; James Deans; Scott Jensen; Monte Sleight; and Tim Shea, staff.

Admissions and Administration Subcommittee: Judge Royal Hansen, chair; Robert Rice, vice chair; John Baldwin; Sue Crismon; Julie Emery; Ellen Maycock; Senator Stephen Urquhart; and Elizabeth Wright, staff.

Ethics and Discipline Subcommittee: Judge Kate Toomey, chair; James Jardine, vice chair; Mary Jane Ciccarello; Dixie Jackson; Steven Johnson; Commissioner Kim Luhn; Daniel O'Bannon; and Elizabeth Wright, staff.

Executive Subcommittee: Justice Deno Himonas, chair; Judge Royal Hansen, vice chair; Robert Adler; Allison Belnap; Thomas Clarke; James Jardine; Robert Rice; Judge Kate Toomey; Tim Shea, staff; and Elizabeth Wright, staff.

Discussion took place throughout the meeting.

Mr. Shea noted that the Bar Commission is supportive of the Paralegal Practitioner Program. He also mentioned that an article is being prepared for an upcoming Bar Journal. Meetings will be held with members of the Family Law Section of the Bar, the Paralegal Division of the Bar and other appropriate sections of the Bar to discuss the program with them.

**5. ADJOURN**

The meeting was adjourned.