



James E. Rogers
College of Law

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LEGAL PARAPROFESSIONAL SUMMIT 2025 CONFERENCE REPORT

Legal Paraprofessionals in Action!

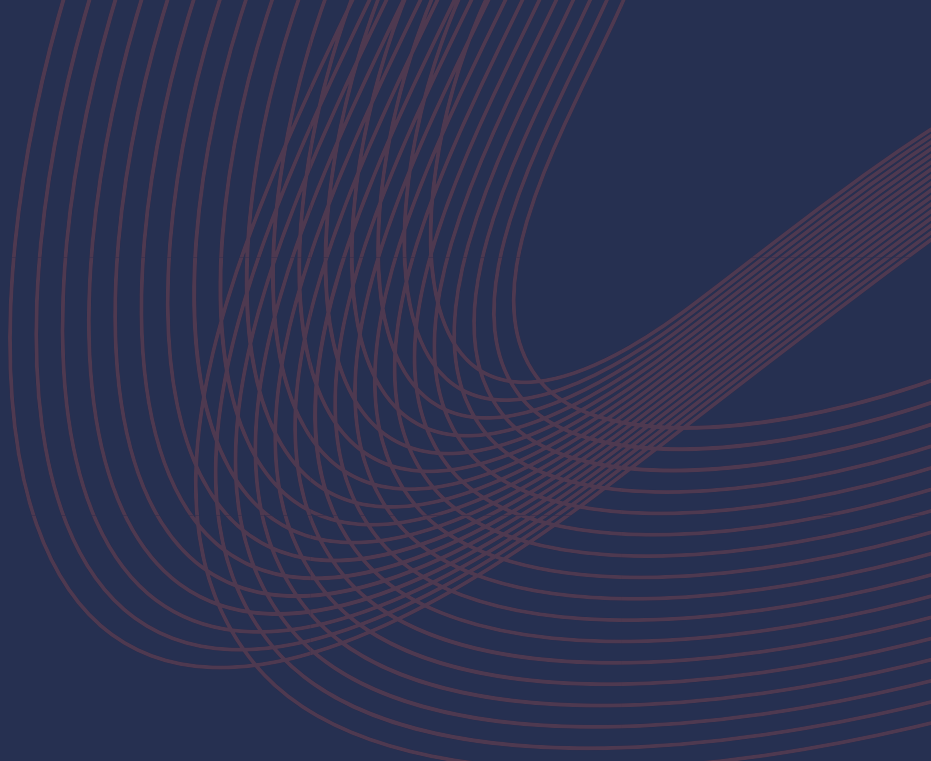


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INTRODUCTION

The third annual Arizona Legal Paraprofessional Summit brought together legal professionals, educators, policymakers, and stakeholders to discuss the evolving role of legal paraprofessionals in the state's justice system. As Arizona continues to expand access to legal services through the Legal Paraprofessional (LP) program, this summit served as a vital forum for collaboration, education, and strategic planning.

The event featured insightful panel discussions, keynote addresses, and breakout sessions focused on regulatory updates, ethical considerations, professional development, and the integration of legal paraprofessionals into various practice areas. Participants explored challenges and opportunities in bridging the access-to-justice gap, strengthening legal education pathways, and fostering interdisciplinary partnerships within the legal community.

This report summarizes key takeaways from the summit, including discussions on policy advancements, emerging practice trends, and recommendations for further enhancing the role of legal paraprofessionals in Arizona. It aims to provide a comprehensive overview of the summit's outcomes, offering valuable insights for attendees and stakeholders invested in the future of legal paraprofessional practice.

MILESTONES

2017

Supreme Court Task Force Convened

2021

2021 LP License Approved

2023

University of Arizona Hosts First LP Summit

University of Arizona LP student enrollment exceeds 100

Juvenile and Adoption Law Practice Area Created

2024

82 LPs Licensed

2024

100% of actual Legal Paraprofessional (LP) clients surveyed (34 respondents) reported being satisfied or highly satisfied with the legal services they received from LPs.

OPENING REMARKS: JUSTICE MARIA ELENA CRUZ ARIZONA SUPREME COURT

Justice Maria Elena Cruz delivered opening remarks emphasizing the critical role of legal paraprofessionals in enhancing access to justice in Arizona. She highlighted the program's success in addressing the state's lawyer shortage and its impact on delivering legal services. Justice Cruz also underscored the importance of legal paraprofessionals as advocates and volunteers, encouraging participants to utilize the summit's sessions to build their advocacy skills and explore statewide opportunities.



KEYNOTE ADDRESS: JUSTICE ANN A. SCOTT TIMMER ARIZONA SUPREME COURT

Chief Justice Ann A. Scott Timmer addressed Arizona's critical shortage of legal professionals, noting that the state ranks 49th out of 50 in lawyers per capita. This scarcity leaves many residents without meaningful access to justice. To mitigate this issue, the Legal Paraprofessional (LP) program was established to create a new tier of legal service providers. Justice Timmer highlighted that the overwhelming number of self-represented litigants in courts places judges in challenging positions, as they must balance impartiality with the need to guide unrepresented parties. She emphasized that to bridge the current justice gap, each lawyer in Arizona would need to provide approximately 900 pro bono hours annually. The LP program aims to alleviate this burden by enabling trained paraprofessionals to deliver legal services safely and competently. Justice Timmer also recounted her involvement in the task force that created the LP license. She referenced the World Justice Project's Rule of Law Index, which ranks the United States 107th out of 142 countries in terms of affordability of legal services, underscoring the pressing need for innovative approaches like the LP program to enhance access to justice and the need for the LP program to succeed.

PRESENTATIONS

LP Program Updates from the Administrative Office of the Courts

Presenters:

- Mark McCall, Legal Service Innovations Manager
- Aaron Nash, Division Director, Certification and Licensing
- Ainslee Marcus, Investigator
- Daisy Cambron-Perez, Program Specialist

The Administrative Office of the Courts (AOC) provided a comprehensive update on Arizona's Legal Paraprofessional (LP) Program, outlining recent developments, key goals, and statistical insights.

Certification & Licensing – AOC's Role

The AOC is responsible for regulating 12 professions, including Legal Paraprofessionals (LPs), and providing administrative support to 11 regulatory boards and committees. This oversight ensures that LPs meet the necessary qualifications and uphold professional standards in their practice.

Goals for the LP Program

The AOC has set several strategic objectives to strengthen the LP program:

- Expand the LP profession by surpassing 100 licensed LPs this year.
- Finalize qualifications for LPs in Qualified Domestic Relations Orders (QDROs) and Probate to expand service areas.
- Enhance testing resources, ensuring candidates have access to better preparatory materials.
- Introduce online exams and virtual proctoring, increasing accessibility for prospective LPs.
- Support Continuing Legal Education (CLE) development, focusing on promoting the LP program and providing training on court procedures and rules of evidence.

LP Program Statistics & Demographics

- 68% of current LPs entered the profession through the Experience Track, with others coming from Master of Legal Studies programs, community colleges, and other legal education pathways.
- Services provided by LPs include court representation, document preparation, legal advice, legal research, and mediation.
- 48% of LP clients would otherwise have been self-represented, highlighting the program's impact on increasing legal access.
- The majority of LP clients are in Maricopa County (69%), followed by Pima County (18%).

2024 Program Updates & Policy Developments

- Issued 25 new LP licenses in 2024.
- Clarified language in LP regulations to improve consistency.
- Added a Juvenile Dependency exam, expanding LP service areas.
- Formed committees to examine qualifications for QDROs and Probate, paving the way for future licensing expansions.
- Proposed an amendment to Supreme Court Rule 39, allowing LPs to participate in law college clinics for practical experience.

The AOC's updates reflect a strong commitment to expanding, refining, and promoting the LP profession in Arizona, ensuring that LPs continue to play a crucial role in bridging the access-to-justice gap.

PRESENTATIONS

LP Panel Discussion

Presenters:

- Jason Halper
- Nitasha Miller
- Victoria Seros
- Conrad Simon
- Candace Thude

A diverse panel of licensed legal paraprofessionals (LPs) shared their experiences, challenges, and advice on navigating the profession, distinguishing LP roles from paralegal work, and establishing themselves in a growing field.

Professional Backgrounds of Panelists

Panelists came from a wide range of career paths before becoming LPs, including:

- Military and law enforcement – Marine Corps, military intelligence, correctional officers, juvenile court clerks.
- Legal experience – Paralegals, legal assistants, law firm receptionists, government employees (Attorney General’s Office), and court clerks.
- Other fields – Pest-control sales, philosophy graduates, and boutique firm administrators.

This diverse mix highlighted the variety of experiences that led them to the LP profession, showing that legal paraprofessionals come from both traditional and non-traditional legal backgrounds.

Licensing Experience & Advice

Panelists reflected on the challenges of studying and preparing for LP licensing. Key advice included:

- Read through the court rules multiple times, focusing on ethics and professionalism.
- Review RAQs (Rule-Applicable Questions) carefully.
- Space out exams over multiple days rather than attempting them all at once.
- Take the time to fully understand legal writing, research, and procedural requirements.

Comparing LPs to Paralegals

- LPs have a greater focus on legal precedent, writing, and research, allowing them to advocate for clients and handle cases more independently than paralegals.
- LPs must also advocate for themselves in law firms since the profession is new, and some attorneys struggle to integrate LPs into their practice.

Advice for Building an LP Practice

- Use the QUILT program (Pima County Bar Association) as a resource.
- Develop a website that uses client-friendly language optimized for search engines (SEO) to attract people looking for legal help.
- Market LP services as a cost-effective alternative to attorneys, emphasizing affordability while maintaining professional expertise.

Client Reactions to LPs

Clients often express surprise and appreciation upon learning about LPs, as many were unaware that licensed professionals could provide legal services at a lower cost than attorneys. Educating clients about the LP profession remains essential to growing public awareness and trust.

The discussion underscored both the opportunities and challenges LPs face as pioneers in an evolving profession, emphasizing the importance of education, marketing, and self-advocacy.

PRESENTATIONS

Preparing, Identifying, and Admitting Evidence During Trial

Presenter:

- Hon. Catherine Monro, Pima County Superior Court

Catherine Monro's presentation provided legal paraprofessionals (LPs) with essential guidance on handling evidence in trial settings, focusing on preparation, identification, and proper admission procedures.

1. Preparing Evidence for Trial

- Know the Rules of Evidence – LPs must thoroughly understand Arizona Rules of Evidence and how they apply to different types of evidence.
- Organize and Pre-Mark Evidence – Properly labeling and categorizing exhibits before trial streamlines the admission process.
- Ensure Authenticity and Relevance – LPs should verify the credibility, chain of custody, and necessity of each piece of evidence before attempting to introduce it.
- Anticipate Objections – Understanding common objections (e.g., hearsay, relevance, lack of foundation) helps LPs prepare responses in advance.

2. Identifying and Presenting Evidence

- Laying a Foundation – LPs must establish the origin, relevance, and reliability of evidence before submitting it.
- Direct Examination – When presenting evidence through witnesses, LPs should ask clear and structured questions to authenticate documents, photos, or physical evidence.
- Best Evidence Rule – When presenting documents, LPs should use the original whenever possible unless an exception applies.

3. Admitting Evidence During Trial

- Follow the Proper Steps for Admission:
 - a. Mark the exhibit for identification.
 - b. Show the exhibit to opposing counsel for review.
 - c. Ask the witness to identify the evidence and establish its foundation.
 - d. Move to admit the evidence into the record.
 - e. Respond to objections if raised by opposing counsel.

Key Takeaways for Legal Paraprofessionals

- Maintain Professionalism – LPs should stay composed and prepared when handling objections or challenges from opposing counsel.
- Mastering evidentiary procedures enhances credibility and effectiveness in court.
- Thorough preparation reduces the risk of objections and exclusions.
- Strong courtroom presence and clear communication are crucial when presenting and admitting evidence.

Judge Monro's presentation emphasized the importance of preparation, precision, and confidence when handling evidence, ensuring LPs can successfully introduce and defend exhibits in court proceedings.

PRESENTATIONS

Courtroom Decorum

Presenters:

- Justice Maria Elena Cruz, Arizona Supreme Court
- Judge Brian Furuya, Arizona Court of Appeals, Div. 1

This presentation emphasized the critical role of appearance, behavior, and professionalism in maintaining credibility and effectiveness in the courtroom.

How to Look: The Importance of Professional Dress

- Business professional attire is essential for all courtroom appearances.
- Why does this matter?
 - Context and setting dictate the need for formal dress.
 - Dressing professionally shows respect for the court and demonstrates that legal issues are being taken seriously.
 - First impressions matter—appearance influences perception, builds trust, and signals competence.
- Psychological research supports the impact of professional attire on how one is perceived by judges, clients, and opposing counsel.
- Advocacy is not just verbal—how one presents themselves communicates just as much as their arguments.
- Confidence through appearance: Dressing professionally is like putting on armor for any legal interaction, helping to project authority and self-assurance.

How to Act: Conduct in the Courtroom

- Mark Twain's Quote: "Action speaks louder than words but not nearly as often."
- Order and Respect:
 - The courtroom must maintain decorum and order at all times.
 - There is a time to be passionate, but not when opposing counsel is speaking.
- Timeliness Matters:
 - Arrive early, be prepared, and stay engaged.
 - Know the layout of the courtroom in advance to avoid last-minute confusion.
 - Pause and listen when it is your time to stop speaking.

How to Be: Professionalism and Composure

- Rule 41(a), the Oath of Admission, and the Creed of Professionalism set the ethical and behavioral expectations for legal professionals.
- Keep your cool—never lose your temper in court.
- Does intensity work?
 - No—it is usually counterproductive.
 - Losing composure can:
 - Distract the decision-maker from the actual merits of the case.
 - Erode credibility and weaken the advocate's position.

Key Takeaways:

- Professional appearance, behavior, and composure are crucial for courtroom success.
- Self-discipline and respect for procedure enhance credibility and advocacy effectiveness.
- Legal professionals should always control their narrative through professional presentation and demeanor.

PRESENTATIONS

The Art of Storytelling: Building Your Client's Case Through Testimony

This presentation focused on the importance of narrative in legal arguments and how legal paraprofessionals can craft compelling case presentations to engage judges, juries, and readers.

Why Storytelling Matters in Legal Advocacy

- Memorable and impactful: Presenting facts in a narrative format makes information easier to understand and recall.
- Storytelling is not fabrication: It is about structuring facts thoughtfully to support a specific point of view.

Elements of a Strong Legal Narrative

- Character, Conflict, and Resolution
 - Ensure logic, consistency, and completeness in the story.
- The LOCK Method:
 - Lead Character – The client.
 - Objective – What they seek.
 - Conflict/Confrontation – The legal or factual dispute.
 - Resolution/Knockout – The conclusion that supports the client's case.
- Types of Conflict in Legal Cases
 - Classical, Modern, Post-Modern.
 - Identifying the right conflict humanizes the client and strengthens the argument.

Crafting a Persuasive Story

- Cast the story's characters strategically:
 - What archetypes fit each major player?
 - What facts reinforce or contradict these labels?
 - Highlight strengths and flaws to create a compelling theme.
- Conflict drives the story:
 - A character's struggle reveals who they are and keeps the audience engaged.
 - Example: Rocky – His conflict is about overcoming the underdog label.
- Structure the case from the client's perspective:
 - Focus on action and specificity rather than abstract legal language.
 - Example: Instead of "Defects have propagated in defendant's vehicles", use "Jumai Corp. churned out vehicles with broken taillights in all three factories."

Presenters:

- Sylvia Lett, Associate Clinical Professor of Law, Univ. of Arizona James E. Rogers College of Law

Resolution and Rebuttal

- The resolution should align with the conflict and character.
- On appeal, demonstrate how the lower court's resolution was incorrect.
- Countering opposing narratives:
 - Correct false facts immediately.
 - Use pathos (emotional appeal) judiciously in pleadings.

Visual Storytelling in Legal Writing

- Graphics and visuals enhance impact:
- Aristotle's Persuasion Framework:
 - Logos (logic) – Strong legal arguments.
 - Ethos (credibility) – Professionalism as a legal advocate.
 - Pathos (emotion) – Connecting with the audience without overdoing emotional appeals.

Choosing the Right Facts to Include

- Prioritize legally significant facts while providing background for context.
- Weave in emotional facts strategically to support, not overshadow, the case.
- Structure details strategically:
 - Good facts first, then blend in weaker facts.
 - Drop or minimize unnecessary details (e.g., redundant names or dates).

Using AI in Legal Writing

- Idea Generation: Brainstorm ways to frame the case.
- Outline & Structure: Arrange facts chronologically or by significance.
- Style & Adjustments: Example prompts: "Make this more persuasive" or "Clean this up."
- AI is a tool, but use with caution—be mindful of potential risks in legal practice.

Key Takeaways

- Legal writing is about effective communication, not just facts.
- A well-crafted narrative can strengthen a case by making it engaging and persuasive.
- Details, structure, and emotional appeal must be carefully balanced.
- Visuals and AI tools can enhance storytelling but must be used wisely.

PRESENTATIONS

Pro Bono Volunteer Opportunities for Legal Paraprofessionals

Presenters:

- Lila Sol, Director, Southern Arizona Legal Aid
- Pat Yango & Jacqueline Alvarez, Step Up to Justice
- Pam Bridge, Director of Advocacy, Community Legal Services
- Adam S. Cirzan, DNA People's Legal Services

Southern Arizona Legal Aid (SALA) has been a cornerstone of legal assistance in the region since its founding in 1951 by five Tucson lawyers and their spouses. Over the years, it has grown significantly, hiring its first director in 1963 and officially becoming Southern Arizona Legal Aid, Inc. in 1977. Today, SALA serves nine Southern Arizona counties, providing legal aid to individuals with incomes up to 200% of the federal poverty guidelines. Under the leadership of Lila Sol, Director & Managing Attorney of the Volunteer Lawyers Program (VLP), SALA assists clients in family law, housing, public benefits, consumer protection, immigration, Native American law, homeless veteran support, marijuana expungement, and civil rights restoration. The VLP plays a crucial role in offering legal information classes focused on family law, advice clinics, and direct case referrals to volunteer attorneys. Family law remains the program's largest practice area, followed by employment and bankruptcy cases. The clinic-based approach empowers clients to help themselves, aligning with the Arizona Rules of Professional Conduct, which encourage legal professionals to contribute 50 hours of pro bono work annually. Volunteers benefit from CLE credit, mentorship, hands-on experience, and networking opportunities. www.sazlegalaids.org

Step Up to Justice (SU2J), led by Pat Yango and Jacqueline Alvarez, provides free legal aid to clients with incomes at or below 125% of the federal poverty guidelines and non-exempt assets under \$10,000. However, court-sponsored projects allow for some exceptions to these requirements. SU2J focuses on family law, consumer protection, minor guardianship, landlord-tenant disputes, wills, probate, and end-of-life planning. The organization offers assistance through direct representation and community education initiatives like RENT and MAPP, designed to prevent civil legal crises before they occur. These educational workshops, available in person and via Zoom, inform individuals of their rights and responsibilities. Presented by licensed volunteer attorneys, these sessions provide legal education rather than direct legal advice. Resources are accessible at no cost through SU2J's website and community outreach events. www.stepuptojustice.org

Community Legal Services (CLS), a nonprofit law firm similar to SALA, is led by Pam Bridge, Director of Advocacy and Litigation. CLS serves low-income families and individuals across Maricopa, Yavapai, Mohave, La Paz, and Yuma counties. While the organization primarily assists clients with legal status in the U.S., some exceptions apply. CLS focuses on legal issues related to health and economic stability, employment, taxes, farmworker rights, marijuana expungements under Proposition 207, housing, family law, and consumer rights. One of its most significant initiatives, the Tenants Eviction Assistance Project (TEAP), emerged in response to increased housing instability following COVID-19. TEAP offers no-cost legal aid to individuals facing eviction, regardless of income. CLS attorneys also take on family law cases, particularly for clients experiencing domestic violence, as well as divorce, custody modifications, and guardianship matters. The firm's Probate Lawyers Assistance Project and Family Law Assistance Project further extend their reach. CLS welcomes volunteers in various legal fields, including bankruptcy, consumer law, landlord-tenant disputes, and juvenile law. A newly approved Supreme Court program now allows community members over 18 to receive training and certification to assist clients in finding legal information under supervision. www.clsaz.org

DNA People's Legal Services, represented by Adam Cirzan, serves Northern Arizona with multiple offices, including its primary location in Flagstaff. Like SALA and CLS, DNA provides civil legal aid to low-income clients, including representation in tribal court cases. Its practice areas mirror those of the other organizations, encompassing consumer protection, family law, administrative law, and other civil legal matters. www.dnalegalservices.org

Through these legal aid organizations, Arizona residents facing financial hardships can access crucial legal support, ensuring justice and representation for those in need.

PRESENTATIONS

Ethics Considerations for Legal Paraprofessionals

Presenters:

- Prof. Keith Swisher, Director
BA in Law and Master of Legal Studies Programs
University of Arizona James E. Rogers College of Law

General LP Ethics

- Legal Paraprofessionals in Arizona are held to high ethical standards and are required to comply with multiple Supreme Court Rules. Each LP must adhere to Supreme Court Rule 42, which includes the Arizona Rules of Professional Conduct. Additionally, LPs must complete annual Continuing Legal Education (CLE) courses focused on ethics to maintain their knowledge and compliance.
- Professionalism is also a key requirement for LPs, as they must follow Supreme Court Rule 41, which governs professional responsibilities, and they are mandated to complete a professionalism course. Trust accounts, which are crucial for handling client funds, fall under the purview of Supreme Court Rule 43, ensuring that LPs manage client funds with integrity and accountability.
- LPs are also subject to Supreme Court Rule 32(c)(13), which mandates insurance disclosures. A significant new rule, Ethical Rule (ER) 1.4(d), now requires LPs to inform their clients if they do not carry malpractice insurance, ensuring transparency and informed decision-making by clients.
- Another important aspect of LP practice is interpreting statutes that use the term "attorney." In certain cases, LPs may substitute the word "legal paraprofessional" where applicable.

Generative AI and Ethics

- The rise of generative AI presents both opportunities and challenges for LPs. While AI can be a useful tool for summarizing cases and drafting documents, its ethical implications remain uncertain. There are significant risks, including intellectual property concerns and the unpredictability of court rulings on AI-generated content.
- One major ethical concern is confidentiality. LPs must avoid inputting client information into open AI platforms to protect sensitive data. Additionally, LPs should be aware of their employer's or jurisdiction's policies on AI use, ensuring they comply with existing regulations and ethical guidelines.
- When billing clients, LPs must be cautious about charging for AI-generated work. AI systems can fabricate information, making it imperative that LPs verify all outputs before use. To mitigate risks, LPs should answer key questions regarding document access, storage, and compliance with confidentiality standards.

LP Ethical Questions

Ethical considerations for LPs span multiple areas, including:

- Getting started in practice
- Business generation and ethical marketing
- Defining and adhering to the LP scope of practice

Prof. Swisher presented various hypothetical scenarios illustrating ethical dilemmas faced by LPs. These examples helped highlight the importance of ethical decision-making and adherence to professional standards within the LP practice.

The legal paraprofessional profession continues to evolve, and with it, the ethical landscape. As new challenges arise, particularly with the integration of AI, LPs must remain vigilant and committed to upholding the highest ethical standards to maintain public trust and ensure access to justice for all Arizonans.

CLOSING REMARKS: JUDGE BRIAN FURUYA ARIZONA COURT OF APPEALS DIV. 1

Judge Furuya closed the 3rd Annual Legal Paraprofessional Summit with a reminder that Legal Paraprofessionals (LPs) and future LPs are pioneers, leading a cutting-edge innovation in the practice of law in the United States:

"The LP program provides one very real solution to the access to justice crisis facing both the nation and the state of Arizona. Law school is not the right path for everyone, and there must be alternative ways for individuals to contribute to the legal profession who wish to do so.

Today's LPs serve as pioneers in this transformation, tasked with cutting through bureaucratic brush, removing obstacles, blazing new trails, and paving the way for those who will follow. Change has always depended on individuals willing to take on these challenges, and the LP program embodies this forward momentum. However, for meaningful change to take hold, the public must have confidence in our legal system.

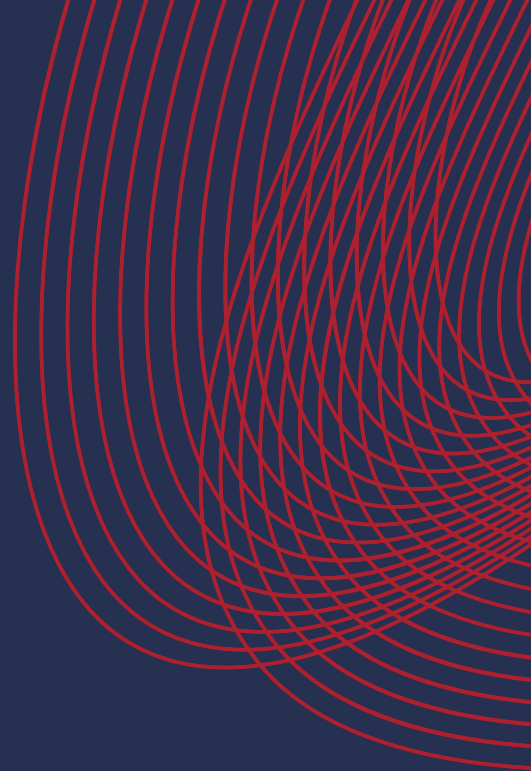
Historically, the courts have been viewed as the most trusted branch of government, but this trust has been in sharp decline. I fear that this decline is due in no small part to the difficulties that many, many people have in finding competent and affordable professional help in navigating their legal troubles. It is our responsibility within the legal system to restore that trust.

The LP program represents one of the Arizona Supreme Court's key innovations to regain public confidence and ensure broader access to justice!"



QUESTIONS? CONTACT US.

LAW.ARIZONA.EDU/LEGAL-PARAPROFESSIONAL



James E. Rogers
College of Law

www.law.arizona.edu
University of Arizona James
E. Rogers College of Law
P.O. Box 210176
Tucson, AZ 85721