

A publication
from the
ABA Standing
Committee
on Paralegals

UPdate

CDEL Paralegals Strengthen the Culture of Chicago Pro Bono Law

by Elaine Harrison

Upcoming events

NALS Professional Development & Education Conference
3/10 – 3/12/2005
Tulsa, OK

AAfPE Regional Conference North East
3/18 – 3/19/2005
Salem, MA

AAfPE Regional Conference Pacific
3/31 – 4/2/2005
Seattle, WA

AAfPE Regional Conference South East
4/1 – 4/2/2005
Raleigh, NC

NFPA 2005 Annual Convention
4/28 – 5/1/2005
Las Vegas, NV

NALA 30th Annual Convention
7/13 - 7/16/2005
Kansas City, KS

AAfPE Regional Conference South Central
TBA

Paralegals play a significant role at the Center for Disability and Elder Law (CDEL). CDEL, founded in 1984 by the Young Lawyers Section of the Chicago Bar Association and housed in the Rehabilitation Institute of Chicago, has served more than 40,000 clients in Cook County, Illinois. In 2004, CDEL provided pro bono legal services to 3,487 individuals marginalized by poverty, disability, and age.

Studies show that 50% of the poor experience at least one legal problem annually. Sadly, only 20% of these individuals receive help. As our society becomes more and more enmeshed in legalities that define individual rights and responsibilities, the low-income disabled and elderly are particularly

challenged to find quality legal assistance. And, while the need for free legal services rises as government funding wanes, the poor must rely on the largesse of the private and corporate legal community to

provide them an equal footing in the system.

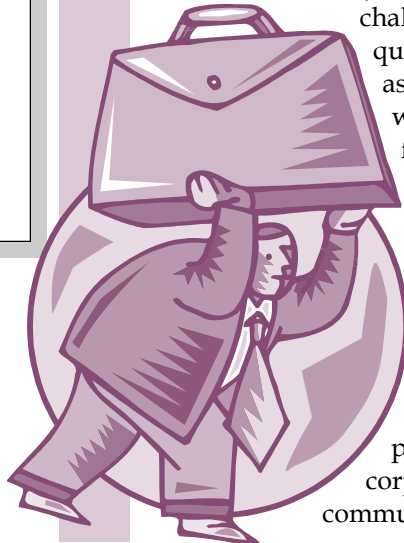
More than 200 paralegals work with CDEL and hundreds of volunteer attorneys to handle cases in all practice areas, excluding criminal and personal injury law. Working through CDEL's innovative operating model, paralegals serve as the first professional contact to CDEL-qualified clients, establishing the groundwork for cases through skilled interviewing and case summaries.



Jann Dragovich-Stulberg

"The intake interview is a critically important step in the CDEL case management process," said Jann Dragovich-Stulberg, CDEL's Executive Director for the past 18 years. "After an intake is completed, it is sent, along with supporting documents, to a CDEL pro bono attorney for a case determination. The attorney's assessment allows us to then place the approved case with an attorney who will represent the CDEL client. Obviously, our intakes must be thorough and clear, to expedite the case management process. We are grateful to have such

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Welcome to our new Commission members

The Commission welcomed several new members in 2004-2005. We are pleased they have joined us and welcome their participation. Following are brief descriptions about their background and current work.

Joyce Becker is Director, Paralegal Program and Associate Dean for Assessment & Institutional Research at Villa Julie College, a coeducational independent college with 2,500 students, located near Baltimore. There are approximately 200 students in the college's paralegal program, which was one of the first to be approved by the ABA in the mid-1970s. Joyce has a J.D. degree with honors from the University of Maryland School of Law and a B.A., *magna cum laude*,



from the College of Notre Dame of Maryland. She has practiced law, most recently at Venable, Baetjer & Howard, LLP. In addition to her ABA leadership position, Joyce is an active speaker and writer for a number of professional organizations. Joyce says, "One of my global goals as a member of the Approval Commission is to promote ABA approval

for all paralegal programs to ensure quality. My goal for the programs I visit as a team member is to assist programs in making sure their programs are the best they can be given their individual circumstances."

Colonel James P. Gerstenlauer is currently the Dean of The Judge Advocate General's School for the United States Army in Charlottesville, Virginia. In that position, he serves as the chief academic and operating officer for an American Bar Association approved, LL.M. degree granting institution serv-



James P. Gerstenlauer

ing more than 4,000 resident and 7,000 total military and civilian students annually. Colonel Gerstenlauer has served in a variety of legal assignments, including Staff Judge Advocate (General Counsel) for the United States Military Academy at West Point; Staff Judge Advocate for the 3d Infantry Division (Mechanized); Chief of the Tort Claims Division of the U.S. Army

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Q&A with Frances P. Kao

Chair

ABA Standing Committee on Paralegals

Update spoke with Frances P. Kao, who was recently appointed chair of the ABA's Standing Committee on Paralegals

Tell us a little bit about your current position in the legal profession.

I'm a litigation partner in the Chicago office of Skadden, Arps, Slate, Meagher & Flom LLP, a full-service law firm with 1,700 attorneys in 22 offices around the world. The Chicago office has 180 attorneys and 33 paralegals. I've had a long career at Skadden – probably most interesting is the fact that I started at Skadden as a litigation paralegal in 1987 and continued to work at the firm as a paralegal while going to law school.

After I finished law school, I joined Skadden's Los Angeles office, where I practiced for nearly seven years. I then relocated back to the Chicago office where I made partner. My practice is in general complex litigation with specific experience in the oil and gas industry, franchise law, and a significant amount of international work in Asia, among other places.

I am very lucky to have a solid contingent of paralegals here in Chicago, including a core group of "career" paralegals who have been in this office practically since the office opened its doors and who are very familiar with our clients and practice areas.

How long have you been involved as an ABA leader and what projects have you worked on?

Three years ago I was appointed to the Standing Committee on Paralegals. During my tenure on the Committee, I've had the opportunity to work with our educational

consultant, Teri Cannon, and another committee member, Mike Gordon, to edit and rewrite both the paralegal utilization guidelines and the comments to those guidelines. Now, we are in the process of trying to convert those guidelines into a CLE module, especially the ethics component of that effort.

How do you use paralegals in your practice at Skadden?

I rely on paralegals quite a bit in my practice. They are the key to organizing my cases and documents – particularly in the large, multi-district litigations. The paralegals also participate extensively in the discovery effort by working with clients to review and produce documents, helping prepare for depositions, working on the preparation of witnesses, and also doing a lot of fact checking and background searches for witnesses. I probably rely on paralegals every bit as much as I do any of my attorney colleagues.



Frances P. Kao

What trends or issues are particularly noteworthy in the legal profession, and especially significant for paralegals?

Regulatory issues are worth watching. This trend seems to be driven by the proliferation of document preparers whose business is marketed to the general public that may not necessarily be knowledgeable in the differences between document preparers and

paralegals. Another trend focuses on delegation issues. Many small firms will be trying to make their services more affordable to their clients and will, therefore, use paralegals more extensively to maximize cost-efficiencies. Doing this raises issues regarding accountability and supervision, but the key question really is: how do we balance the costs of legal services without sacrificing quality or client service?

Distance learning in paralegal education is another important topic. This is a tough issue that will need a careful assessment of the benefits and outcomes in non-traditional learning approaches.

What are your goals for the Standing Committee?

I'd like to make the Committee's resources more accessible to small firms and solos. On the table right now are two joint projects with other ABA entities. We're in the discussion phase with the Business Law section about the possibility of doing co-sponsored seminars or flyers about paralegal utilization. Another project is a presentation that the Committee will undertake in partnership with the ABA's General Practice, Solo & Small Firm Section at the 2005 Annual Meeting.

What are your interests outside of work?

I am an avid reader and book collector. For the past four years, I've been an investor in the Mystery Bookstore (www.mystery-bookstore.com) located in Westwood, CA, close to UCLA. This is one of the largest independent bookstores on the West Coast offering new and collectible crime

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Paralegals in Chicago Pro Bono
(continued from page 1)

a dedicated and talented paralegal volunteer practice," she continued. The front-end work maximizes efficiencies for CDEL, and also offers paralegals outstanding professional development opportunities through college curriculum, specialized training and direct client contact — experiences which enhance their practical training, real world know-how, and marketability.

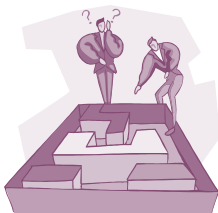
Creating Partnerships with Local Schools

Over the years, CDEL has developed numerous community partnerships



Laurel Vietzen

with Chicago area college and university law schools. One of their most successful programs is a collaboration between CDEL and Elgin Community College in Elgin, Illinois. Laurel Vietzen, who became Coordinator of Paralegal Programs for Elgin College in 2003, describes her students as "non-traditional." "Many of my students are working parents who must contend with the logistics of child rearing, while working *and* going to school. It would not be feasible for these students to take on traditional paralegal internships," said Ms. Vietzen.



So, how, Vietzen wondered, could she offer hands-on experience to these future paralegals?

How would she help her students to develop interviewing and writing skills outside of the mock interview sessions offered as part of the curriculum? The answers came to Vietzen in the fall of 2003, when CDEL pro bono attorney and Elgin Community College professor Ron Kowalczyk introduced her to the Center for Disability and Elder Law. "Ron described the work of CDEL and their many successful community partnerships, including the *Paralegal Partnership Program*." Within two weeks, we had our first paralegal training by CDEL, and our active and strong collaboration is ongoing," said Vietzen.

Vietzen says many of her students, now in their second and third careers, are at in a point their lives where they feel a need to serve the community. "These students are particularly happy to contribute to the mission of CDEL, because CDEL fills the great gap that exists for those who need free legal services and those able to afford them," said Vietzen. "In addition to the altruistic aspects of our collaboration, CDEL meets a great need by giving our students excellent hands-on experience. Since CDEL's intake interviews are most often done by phone, my students are able to conduct the interviews according to their schedules," said Vietzen. "Our partnership with CDEL has offered a tremendous practical learning experience for my students, and reinforced, at an early stage, the importance of the pro bono culture within the legal profession," she continued.

Partnerships with Volunteers and Law Firms

As with any law firm, CDEL has practice partners. CDEL volunteer partners serve as a think tank, working with CDEL staff to identify best practices throughout CDEL practice groups and

programs. CDEL's *Paralegal Partnership Program* partner is Tracey O'Keefe, a four year CDEL volunteer and Pro Bono Manager at Gardner Carton & Douglas, Chicago. "One of the reasons I'm particularly involved with CDEL is because this organization recognizes and values the role of the paralegal in the case management process," said O'Keefe. "With CDEL's tremendous caseload, there are always opportunities for our paralegals to serve. And, CDEL intakes allow our paralegals to directly contribute to the pro bono culture of our firm."



Tracey O'Keefe

O'Keefe also is the President-Elect of the *International Paralegal Management Association* (IPMA), an international professional association that promotes the development, professional standing, and visibility of paralegal program managers in law firms and corporate and government legal departments. In October 2004, the Chicago Chapter of IPMA chose CDEL as their partner for a special Community Service Day event commemorating IPMA's 20th anniversary.

Hosted at the offices of Gardner Carton & Douglas, two dozen CDEL clients, who ordinarily would have had their intake interviews conducted by phone, were invited to personally meet with paralegals to discuss their cases. Before the client interviews, the management staff of CDEL — Executive Director Jann Dragovich-Stulberg, Managing Pro Bono



Miriam Seitz

Coordinator Miriam Seitz, and pro bono coordinator/attorney Zig Sokolnicki – conducted training sessions for the paralegal participants. The CDEL Paralegal Partnership Program trainings include an intake training manual, which contains case specific questionnaires and legal forms, along with individual practice area information and guides for effective interviews and written summaries. Miriam Seitz, administrator of CDEL's paralegal programs and facilitator of the IPMA event was pleased with the interaction between paralegals and CDEL clients: "It was so rewarding to see the paralegals working one-to-one with our clients. The clients were very appreciative of the special care and time devoted to them, while the paralegals were gratified by the opportunity to personally attend to the clients. It was a win-win for everyone."

Peer Review Program and Law Firm Involvement

The *Peer Review Program (PRP)*, a collaborative effort between CDEL and Holland & Knight, Chicago, takes the CDEL *Paralegal Partnership Program* experience to another level, providing mentorship and support for paralegal students and practicing paralegals who offer their time to CDEL clients. The PRP offers each student and paralegal volunteer a personal mentor, who critiques completed intake interviews and acts as a coach

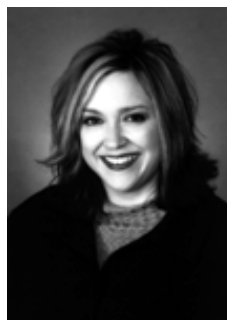


when challenges and questions arise. Mentors offer insight on interviewing techniques and help their colleagues hone their writing skills.

The PRP has been enthusiastically received, not only by college programs, but by many prestigious Chicago law firms that value the professional development offered to their paralegals.

Veteran paralegal Valarie Shafer of Holland & Knight, Chicago, is one of CDEL's most active paralegal volunteers and was recently named *Peer Review Program Partner*. "CDEL offers paralegals the chance to directly help people who are truly in need of assistance," said Shafer. "The personal fulfillment we find in working with CDEL clients is matched by the enrichment of our skills we receive as practicing CDEL paralegals. The *CDEL Peer Review Program* helps participants sharpen their craft, offering them a professional edge in a very competitive field."

In addition to Gardner Carton & Douglas and Holland & Knight, paralegals from Winston & Strawn, Sidley Austin Brown & Wood, Foley & Lardner, Mayer Brown Rowe & Maw, McDonald's Corporation, Abbott Laboratories, and Federal Signal Corporation have worked with CDEL on numerous cases.



Valarie Shafer

Attorney Peter J. Mone of Baker & McKenzie has been CDEL's Board President since 1999. Of the paralegal role within the CDEL model, Mone says, "Our paralegals lay the foundation for our CDEL case management process. Their gifts of time and heart on behalf of our clients are invaluable and their outstanding contributions to the CDEL organization are integral to the success of the pro bono culture in Chicago." ♦

CDEL is always happy to welcome new volunteers to their panel. To learn more about the CDEL organization and learn how you might participate in their Chicago programs, please contact Managing Pro Bono Coordinator Miriam Seitz at: CDEL 710 N. Lake Shore Drive, Suite 300, Chicago, IL 60611. Phone: 312-908-8707 (TTY: 312-908-8705) Fax: 312-908-0866. E-mail: miriamseitz_cdel@yahoo.com

Article ideas?

We're interested in your work! Tell us if you've started a



new program, have an interesting approach, or know someone whose work would inspire other educators or paralegals. Contact Peggy Wallace at the ABA's Standing Committee on Paralegals at: wallacep@staff.abanet.org, or Paula Tsurutani, editor of *Update*, at: ptsurutani@sbcglobal.net with your article ideas. ♦

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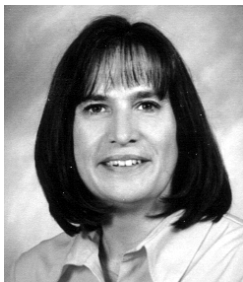
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*Welcome to our new Commission members
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Claims Service; Professor of Criminal Law; and prosecution and defense trial attorney and supervisory positions. He has worked with paralegals for more than 20 years and has seen paralegals assume steadily increasing responsibility and become involved in all aspects of the legal profession. His goals as a member of the ABA Approval Commission are to "contribute to the profession by helping to ensure that paralegals are consistently provided the best possible, most comprehensive education and to improve the education of Army paralegals by bringing the best practices from approved institutions to the JAG school."

Janet L. Holmgren CLA, is a paralegal with Riehlman, Shafer and Shafer in the Tully, NY office. She has more than 25 years of experience in the paralegal field and received her certification from the National Association of Legal Assistants in 1991.

Aside from her ABA involvement, Janet is Professional Development Sub-Committee Chair of the Onondaga County Bar Association Legal Assistants Committee, and a member of the New York State Bar Law Practice Management Committee and its Subcommittee on Legal Assistants. She also is a member of the Advisory Board of the Syracuse University Legal Assistant Program and is active in the Empire State Alliance of Paralegal Associations and the National Association of Legal Assistants. On being appointed to the ABA Commission, Janet said: "It is becoming increasingly important that the paralegal profession establish standards, especially in light of the



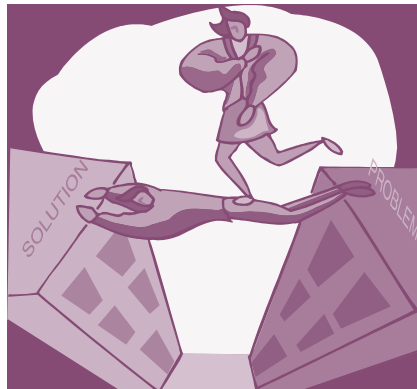
Janet L. Holmgren

recent controversy concerning the views of the Department of Labor on the paralegal profession. Maintaining the ABA standard as the paralegal profession continues to evolve is of paramount importance."

Anita Tebbe has been the director of the Johnson County Community College (JCCC) Paralegal/Legal Nurse Consultant Program in Overland Park, Kansas for the past 13 years. JCCC has nearly 125 paralegal and 25 legal nurse consultant students. She also has been involved with the American Association for Paralegal Education during this time, serving on committees, the board and president. Anita is licensed to practice law in Kansas, and also has a Master's degree in education from the University of Missouri, Kansas City, and an undergraduate degree in history. She is a member of the Kansas Bar Association, the American Bar Association, and the Johnson County Bar Association where she serves as editor of their monthly newsletter. As a member of the American Bar Association Approval Commission, Anita hopes "to enable ABA schools to have the same positive experience that I have experienced with ABA visitors: well-prepared, helpful, and professional." ♦



Anita Tebbe



Two books for paralegals

The ABA Standing Committee on Paralegals has released the new edition of *ABA Approval: A Reference Manual for Paralegal Educators* in mid-October.



This second edition, written in response to major revisions adopted in 2003, contains detailed explanations of new guideline provisions on such issues as assessment, including surveys of employers and graduates; online, compressed and hybrid courses; expectations about faculty involvement in meetings and professional development; placement assistance and new record keeping requirements; and electronic research requirements.

Included are samples and models of various documents and other information relevant to the approval process. Each chapter also provides practical advice on complying with guideline provisions, including: descriptions of how different kinds of programs operate, what staff and site teams look for in their evaluation of a program, and common problems encountered in the review of reports and on site visits. To order from the ABA, call 800-285-2221, or use the order form on page 7. Price: \$100. Please refer to product code 4230043P when ordering.

Professional responsibility is at the core of delivering effective legal services. Legal assistants are expected to obey the ethics rules by which their lawyer employers are bound. To help legal assistants stay on top of ethics issues, the ABA Center for Professional Responsibility has updated *The Legal Assistant's*

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Bon voyage to Merrilou Rauch

Merrilou Rauch, who spent more than 12 years as the Approval Process Manager for the Standing Committee on Paralegals, retired on January 3, 2005.

In describing her career at the ABA, Merrilou said, "If I had to choose one aspect of my job that I liked the best it would be the friendships I have made with paralegal program directors all over the country. I enjoyed helping them navigate the approval process and conversations with them were always interesting and, at times, even entertaining. I will miss them and I hope to stay in contact with many of them. As the number of approved programs has grown through the



Merrilou Rauch

years so has the opportunity to form new friendships."

Though Merrilou will be retiring from the ABA, she will be unusually busy with "lots and lots of travel." In January, February, and March, she will be visiting Harbour Island in the Bahamas, Fort Lauderdale, Las Vegas, and Colorado. She'll also be cruising on a private yacht. Later in the spring, she'll be visiting Australia and New Zealand. When she's not traveling, Merrilou plans to spend more time at home with her four granddaughters. Thanks, and all the best to you, Merrilou! ♦



*Profile of Frances P. Kao
(continued from page 3)*

fiction works. It also has a burgeoning line of children's books. When I lived in L.A., I was a loyal customer and became more involved when I joined a consortium of investors to help ensure the future of the business.

Do you have any recommendations on mystery authors?

Several personal favorites come to mind: Dennis Lehane, who is an outstanding story teller, Barbara Nadel, an English author who writes a series of books set in Istanbul, and Arturo Perez-Reverte, a Spanish author who writes a great deal about the role of honor and faith in the modern world.

How would your friends or colleagues describe you?

They would probably say I am thoughtful, but extraordinarily assertive — but that I always try to be fair. ♦



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Two new books for paralegals
(continued from page 6)

Practical Guide to Professional Responsibility. The new edition reviews the ethics issues that are relevant to paralegals, legal assistants, secretaries, and other employees of law firms, corporations, and law-related organizations and offers guidance that can be adapted to practice in any jurisdiction. To help you find the information you need quickly, the book includes time-saving features such as chapter summaries, quick-reference text boxes, bullet points, and easy-to-find chapter divisions related to specific subtopics. The Guide also includes an index, a glossary of terms and several appendices containing requirements, rules, codes, and guidelines of use to the paralegal.

The Legal Assistant's Practical Guide to Professional Responsibility can be used as: a companion piece for each jurisdiction's lawyer ethics rules; a basic text for a paralegal's ethics class; assigned reading as part

of a paralegal's orientation to a firm; an in-house training program in legal ethics.

To order copies of *The Legal Assistant's Practical Guide to Professional Responsibility*, contact the ABA's Service Center at 800-285-2221. 220 pages, 6x9, spiral-bound. ISBN: 1-59031-392-5. Price: \$39.95. Refer to Product Code 215-0006. ♦

Visit our Web site

Have you visited the Standing Committee's Web site lately (www.abaparalegals.org)? The site contains information on approved programs, career information, listings of upcoming paralegal association meetings, descriptions of the Standing Committee's publications, pdfs of past issues of *Update*, and information on how lawyers can effectively use paralegals in their practice. ♦

Welcome, Mattie

We are pleased to welcome Mattie Evans as the new Approval Process Manager for the ABA Standing Committee on Paralegals Approval Commission.

Before joining the ABA, Mattie was most recently the Director of Student Services at Bishop Noll Institute in Hammond, IN. Mattie can be reached at 312-988-5617 or evansm@staff.abanet.org. ♦



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