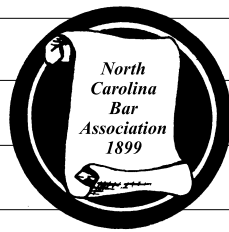


LAD



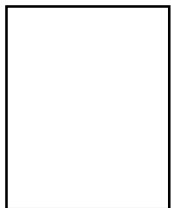
News

A Publication of the NCBA's Legal Assistants Division

Vol. 2, No. 1 September 1998

The Chair's Comments

By Sharon L. Wall, CLA



For many years, the Department of Labor has reported the legal assistant profession as being one of the fastest growing careers in the country. That's been great news for the profession as it continues to mature and expand. To appreciate its success and growth, it's interesting to look back on how the profession began, where we are now, and where we are going.

The evolution of the profession began in the mid-1960s. Because of many economic, technological and social changes, more demands were placed upon the legal system. Economic changes included consumer consciousness and the consumer protection movement. Technological advances resulted from a production to a service-oriented economy, and society changed its attitudes toward the role of women. Demographics also played a large role, particularly with regard to changes in the size and structure of the family.

These changes placed tremendous burdens on the legal system, which forced attorneys to call upon legal secretaries to perform more "paraprofessional" tasks and

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With Leadership in Place, Division Already Hard at Work

Highlights From the LAD's Organizational Meeting

By Brandi W. Holland, CLA

The organizational meeting of the NCBA's Legal Assistants Division (LAD) was held on Friday, May 15, at the N.C. Bar Center in Cary. Then-NCBA President Betty Quick announced the appointment of Sharon L. Wall as the first chair and Richard H. Reich as the first vice chair of the LAD.

Wall called the meeting to order and welcomed members and guests Quick, William Flynn and Susan McAllister (NCBA Board members), Allan Head (NCBA executive director), Jane Weathers (director of section and division activities), Patricia Duncan (president of the Alamance County Paralegal Association), Ralph McCormick (president of the Metrolina Paralegal Association) and Graham Hollett (president of the Raleigh-Wake Paralegal Association).

Quick spoke to those in attendance about the formation of the LAD and reviewed the history of why the board of governors decided to include in the division only legal assistants who work under the supervision of an NCBA member attorney. She encouraged all members to become involved in the various specialty sections and to begin educating lawyers about the utilization of paralegals and how we can work better together.

Quick also explained that the NCBA has a strong legislative process where lawyers can become very involved in making the laws of this state. Members were asked to consider areas where change is needed and to get involved in the legislative process.

Technology is also an important issue facing lawyers and paralegals, Quick said. The year 2000 is approaching quickly, she noted, and encouraged us to begin learning new technology and to help train lawyers on this new technology. Quick also discussed the NCBA's Centennial Celebration, which will take place next year, and encouraged our participation.

Head spoke about where the division fits within the NCBA. He explained the difference between the N.C. State Bar and the N.C. Bar Association. He spoke at length and with excitement about the Centennial Celebration that will kick off in

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Holland, secretary of the LAD, is a litigation legal assistant with Smith, Anderson, Blount, Dorsett, Mitchell & Jernigan in Raleigh.

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LAD News

Vol. 2, No. 1
September 1998

Published by the
Legal Assistants Division
of the N.C. Bar Association

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Chair's Comments

Continued from page 1

fewer clerical tasks. At the same time, the federal government was using many individuals in a legal assistant capacity as a result of increased federal programs for the poor and elderly. Thus, the legal assistant/paralegal profession was born. A new frontier had been forged.

As a result of these changes in the legal profession, the American Bar Association (ABA) formally recognized the legal assistant profession in 1968 when it established the Special Committee on Lay Assistants (now referred to as the Standing Committee on Legal Assistants).

The purpose of the ABA committee was to study how lawyers could effectively use nonlawyers and determine educational requirements and standards for legal assistant education. As a result, the ABA developed standards for accrediting formal education programs in 1972.

Today there are over 800 paralegal educational institutions, with over 240 programs being ABA-approved. Further recognition also came when the National Paralegal Institute was created in 1972 within the government's Office of Legal Services. Several years later it began training paralegals in the delivery of legal services to the poor and elderly.

The last major development in formal recognition came with the formation of the two national legal assistant organizations: the National Association of Legal Assistants and the National Federation of Paralegal Associations. These associations were created to promote the development of the legal assistant profession.

The 1960s saw the birth of the profession and the 1970s saw formal recognition of the profession. In the 1980s, however, the profession suffered an identity crisis. I can personally attest to experiencing this crisis and all of the growing pains that went with it when I began my career in 1981.

With all of the accomplishments in the 1970s, many lawyers still did not know what legal assistants were and, if they did, many did not know what to do with them. "Underutilization" became the buzzword of the 1980s. Fortunately, lawyers learned to use legal assistants in more sophisticated ways by giving them more substantive responsibilities.

Today the profession continues to be about maturing and expanding. Instead of working in traditional environments, such as law firms and governmental agencies, the profession is expanding into corporate legal departments, paralegal teaching positions, freelance services, legal assistant management positions and applying legal assistant skills to other careers. The profes-

sion is no longer considered as a stepping stone to law school. Furthermore, the days of a legal assistant working without formal legal education are steadily declining.

Where are we going and what does the future hold? I can assure you that the future looks exciting and challenging. What is exciting about the profession is that we are still evolving. We are a young profession that certainly has not hit its stride.

One of the challenges that the legal profession has faced and will continue to face in the future will be the constant effort by attorneys to provide the public with access to affordable legal services. This in turn will directly affect the legal assistant profession as legal assistants will be called upon more to assist attorneys with the provision of more affordable services.

This challenge will force one of the biggest cutting-edge issues of the profession, "defining" the legal assistant profession. Defining it will include addressing the unauthorized practice of law, proper supervision, educational standards, and regulation of the profession. These may be some of our biggest challenges yet. In today's world, change is definitely a certainty and the legal assistant profession is no exception.

Without a doubt, the LAD has an exciting and challenging future ahead — this year and for many years to come. As you know, our organizational meeting was held in May. Congratulations to our officers, council members and committee chairs. You have chosen excellent and capable members who will leave impressive marks as our first leaders.

Some of the many goals established for the LAD this year are as follows:

- Establish a three-year long-range plan;
- Establish a three-year CLE plan;
- Provide educational seminars;
- Create training manuals (deskbooks) regarding ethics and substantive areas of practice;
- Adopt a code of ethics;
- Create a Web site;
- Participate in Centennial activities;
- Support attorneys in pro bono efforts;
- Survey the membership;
- Participate in NCBA sections;
- Promote professionalism;
- Establish a liaison with local, state, and national associations; and
- Address cutting-edge issues affecting the profession (*e.g.*, unauthorized practice of law and educational standards).

It's going to be a very busy year for the LAD. Please feel free to share any suggestions you may have so that we may better serve your needs.

Immediately after the organizational meeting, the council held its first meeting. You will want to review the summary of the business

conducted at the organizational meeting on page 1. Our second council meeting was held on July 7 at the Bar Center. This was a very productive meeting. The council heard reports of all the committee activities, and I am delighted to report the following:

● **BARLINC:** The BARLINC Committee, with 11 members, will be setting up a Web page, which we hope you will be able to access in the coming months. The committee is considering including information such as the membership application; bylaws; listing of officers, council members and committee chairs; CLE information; *LAD News*; links to other Web sites; chat rooms and a tips/advice section.

● **Bylaws:** The Bylaws Committee is currently reviewing and considering any proposed bylaw changes. If you have any suggestions, please be sure to contact the Bylaws Committee.

● **Centennial:** The Centennial Committee is presently entertaining ideas for participation in the NCBA Centennial Celebration. The LAD is very interested in participating in this exciting event, and the committee wants to hear your ideas for bar involvement.

● **CLE:** The CLE Committee, with 14 members, is diligently planning upcoming CLE events. The first such event is scheduled for Friday, Oct. 23, at the Bar Center. Registration will begin at 12:30 p.m. and the program will run from 1-4 p.m. Our first seminar will address "Year 2000" issues. Please mark your calendars and make plans to attend.

In addition, the CLE Committee will be involved in assisting in the preparation of a series of deskbooks relative to many areas of law as a part of its three-year plan. We hope the deskbook will provide educational and informational materials that will be a great learning tool for the new paralegal in a particular specialty or be an enhancement for the experienced paralegal.

● **Ethics:** The Ethics Committee will begin its task of drafting a code of ethics for the LAD. It will also follow the status of the proposed revised "Guidelines for Nonlawyers" being considered by the North Carolina State Bar Paralegal Committee. In addition, the Ethics Committee will begin its long-term project of preparing an ethics manual containing all of the legal assistant dos and don'ts (ethical rules and scenarios).

● **Long-Range Planning:** The Long-Range Planning Committee is charged with the duty of establishing a three-year long-range plan for the division. The committee has offered many wonderful ideas as "starting points" for discussion. Some of the ideas will be implemented this year and many will be incorporated in the future. The report of the Long-Range Planning Committee will be provided in the next edition of *LAD News*.

● **Membership:** The Membership Committee kicks off its first year with a membership drive. With the support of the NCBA leadership, the Membership Committee will be soliciting the support of attorneys and legal assistants to increase our membership. In the future, you may see the Membership Committee exhibiting at NCBA CLE events. Please encourage your colleagues to join.

● **Pro Bono:** The Pro Bono Committee plans to solicit and coordinate legal assistants participation in attorneys' pro bono efforts. This is definitely a worthy cause, and I hope you will consider volunteering your time and skills.

● **Publications:** This issue of *LAD News* is evidence of the hard work and excellent product produced by the Publications Committee. You can expect to receive future issues of *LAD News* in November, February and May.

● **Survey:** The Survey Committee is preparing a survey which you will receive during our first year. The first of many surveys will address education, training, salary, benefits, etc.

I am very pleased with our progress in such a short period of time. If you have any ideas or suggestions you wish the council to consider, please call or write me and I will be glad to put them on the agenda.

As the LAD matures and expands in the coming years, we will undoubtedly leave our mark on the legal assistant profession by enhancing it with excellent educational and training programs, setting ethical and professional standards, and being in the coveted position in the legal assistant community to work with the bar leadership in defining our profession in North Carolina.

Let the journey begin! ♦

"What is exciting about the profession is that we are still evolving. We are a young profession that certainly has not hit its stride."

Organizational Meeting

Continued from page 1

January. There currently are seven NCBA committees charged with preparing for the Centennial festivities.

Wall spoke about her excitement for the future of the LAD. She acknowledged the past presidents of the NCBA who have helped the division, and gave special thanks to Gray Wilson, who chaired the NCBA Special Committee to Consider Paralegal Affiliation, which recommended creating the division.

Wall also discussed her ideas and goals for the LAD. (See the "Chair's

Comments" beginning on page 1.) Nominations for the council were accepted by acclamation (see the list of council members and committee chairs elsewhere in this newsletter); the initial budget was approved, and our newsletter was officially named.

Wall then opened the floor for the members to discuss what they want to see happen in the LAD in its initial year and many ideas were presented. With the adjournment of the organizational meeting, the leadership of the bar's newest division was in place and — as should be evident by the various committee reports — is already at work. ♦

Committee Chairs

BARLINC Angela Bardill-Maynard
Bylaws D. Grace Carter
Centennial Charise Alexander
CLE Camille Stell
Long-Range Ping .. Richard H. Reich
Membership Sarah Brown Otey
Nominating Tricia A. Millward
Pro Bono Valerie G. Chaffin
Publication Jackie H. Howell
Survey Michele Lee Boes

Staff Professionalism: A State of Mind

By Nancy Byerly Jones

“Clients expect and deserve to receive professional and courteous treatment and firms should never accept or expect less from its employees.”

Jones is president of the Chapel Hill-based management consulting and employee mediation firm of Nancy Byerly Jones & Associates. She is a former practicing attorney, law office manager and legal assistant.

Staff support members are critical to a firm's success. Likewise, they play a huge role in how firms are perceived by the public. In every interaction staff members have with clients and others not employed by the firm, they must always be mindful of their roles as “managers of first and last impression.” In other words, their client relations and marketing “hats” are enormous ones.

Unprofessional behavior has no place in the law office. A firm's reputation and marketing efforts suffer when employees are on board who exhibit unprofessional conduct and poor attitudes in the office. Likewise, a firm pays a high price if it has employees only interested in getting a paycheck each week with no genuine interest in the firm's or the clients' overall welfare. Clients expect and deserve to receive professional and courteous treatment and firms should never accept or expect less from its employees.

Staff support employees who act like they are still in junior high school are good examples of unprofessional team members. These are the types who love to stir up trouble, gripe ad nauseam about anything and everything, and talk about others behind their backs. These “time bomb” employees may be highly skilled and, therefore, seen as good “worker bees.” In truth, however, they are really “killer bees” because of the ongoing damage they do to office morale, productivity, work quality and client relations.

Professionalism can be demonstrated, described and defined in many ways. When all is said and done, however, professionalism is, and must be, a state of mind. It is indeed a privilege to be a part of the legal system and one that should never be abused. The truly professional support staff member knows this and the firm that employs him or her is fortunate indeed.

Audit Inquiry

- Do I represent the firm in a professional manner at all times when talking with clients or others not employed by the firm?
- Do I carefully guard client confidentialities at all times?

- Do I treat each client as I would like to be treated if I were the client?
- Do I treat each task I perform in my work as representing a self-portrait of myself and my work ethic?
- When answering the telephone, do callers get the impression that I am glad they called or that I am frustrated they have interrupted me?
- Do I project enthusiasm, caring and interest when talking to clients?
- Do I remind myself often that it's the clients who pay my salary?
- Do I restrain from offering clients legal advice even when I know the answer?
- When passing messages from the attorney to clients which contain legal advice, do I remind the clients that the message is from the attorney and that I am not the attorney and, therefore, cannot give legal advice?
- Am I a good team player when my office peers need an extra hand?
- Do I speak respectfully about the attorneys behind their backs?
- Do I work at a pace that ensures a quality work product?
- Do I talk about other staff members behind their backs?
- Even if I don't personally talk about others, do I willingly listen to others gossip or do I discourage others from doing so?
- Do I accent the positives of my job or do I seem to focus primarily on the negatives?
- Do I take the necessary time to organize myself and my work so that each day's top priorities are indeed accomplished?
- Besides satisfactorily meeting the requirements of my job description, can I name at least three additional contributions I have made to the firm over the past few months (positive attitude, systems improvement suggestion, calmed a disgruntled or nervous client, etc.)?
- Am I respectful of other employees' firm responsibilities, their work areas, and their diversity of personal backgrounds?
- If I were the client, would I be satisfied having me as the staff person assigned to the case as demonstrated through the caliber of my job performance, my professionalism, and my attitude? ♦

Q: As an LAD member, can I join NCBA sections?

A: YES, and there are 25 from which to chose, from Administrative Law to Estate Planning to Tax and Real Property. To obtain a section description pamphlet, or to join a section, contact the N.C. Bar Center at 1-800-662-7407.

PARALEGALS IN THE SPOTLIGHT

Supportive Attorney Helps Make LAD Membership Worthwhile

Legal assistants Cheryl Webber and Cyndy Beard are representative of the newest members of the North Carolina Bar Association because of their membership in the new Legal Assistants Division.

Both Cheryl and Cyndy recently attended the organizational meeting of the Legal Assistants Division (LAD) at the Bar Center in Cary. At the present time, the newest NCBA division consists of more than 450 non-attorney members, and membership is growing.

In order to apply for membership in the LAD, Cheryl and Cyndy were required to satisfy several requirements. First, their work must correspond with the definition of a legal assistant, which is "a person who is qualified by work experience and education, working under the direct supervision of a licensed attorney in good standing in North Carolina."

A legal assistant is one who performs "a substantial amount of specifically delegated substantive legal work, which work, for the most part, requires sufficient knowledge of legal concepts that, absent such person doing the work, an

"We also strive to grow professionally as well as personally. Fortunately for us, Mr. Brackett's philosophy of how a law office should be run coincides with these goals."

— Cyndy Beard

attorney would perform the task."

Other criteria for membership include education, successful completion of the voluntary certification exam, years of work experience, a BA or BS degree, or completion of a legal assistant's program sponsored by a local community college, all of which may be considered by the NCBA in accepting legal assistants as non-attorney members of the LAD.

Sponsorship by an attorney licensed to practice law in the state of North Carolina is also required. J. Steven Brackett of the J. Steven Brackett Law Office in Hickory sponsored Cheryl and Cyndy, legal assis-

tants from his firm.

According to Cyndy, "Mr. Brackett supports and encourages our participation in the LAD. He believes that membership will enable us to network with other legal assistants, which will allow us to better serve our clients and to benefit our personal growth as legal assistants.

"Mr. Brackett provides time away from the office, allowing us to attend CLE and other educational opportunities, such as a Windows 95 seminar last month. Serving our clients and enhancing the firm isn't limited to hearings, motions and affidavits.

"Our goals include keeping abreast with the ever-changing technology, such as Y2K. We also strive to grow professionally as well as personally. Fortunately for us, Mr. Brackett's philosophy of how a law office should be run coincides with these goals." ♦

(EDITOR'S NOTE: If you have a "human interest" story for the LAD News, contact Cyndy Beard at PO Box 3769, Hickory, NC 28603, (828) 324-2101; e-mail: penguin@twave.net.)

Year 2000: Strategies for Dealing with Y2K

October 23 ❖ NC Bar Center ❖ Cary

Course planner Jennifer Talley has lined up an interesting slate of speakers and topics for this timely and informative program. To register, or for more information, please contact the N.C. Bar Foundation's CLE Department at 1-800-228-3402 or (919) 677-8745.

Agenda

12:30 - 1 pm	Registration
1 - 2 pm	"What is the Y2K Problem" — David Marshall, Durham. Y2K basics; how might Y2K affect law firms and their clients; what the Y2K problems may affect.
2 - 2:15 pm	Break
2:15 - 3:15 pm	"What Can Law Firms do to Prepare Themselves and Their Clients" — Veda Jones Richardson, Durham. What are businesses required to do; insurance protection; prevention strategies; disclosure issues.
3:15 - 3:30 pm	Break
3:30 - 4:30 pm	"Possibilities for Expanding Practice Into Handling Y2K Issues" — Theodore "Ted" Harper, Raleigh. Who is at risk for becoming a party to a Y2K lawsuit; potential of litigation; new issues of law
4:30 - 4:45 pm	Q&A Session

COST: NCBA Members: \$100 ("early bird" rate - by Oct. 16); \$130 after Oct. 16.

Nonmembers: \$140 ("early bird" rate - by Oct. 16); \$170 after Oct. 16.

Committee Reports



CLE

The LAD CLE Committee is composed of 13 members representing geographical diversity. They are as follows: Shirley A. Brooks (Fayetteville), Holly Davis (Greensboro), Cindy Fowler (Winston-Salem), Lauren B. Jacuzio (Raleigh), Debra A. Leach (Raleigh), Sarah C. Madej (Durham), Elizabeth M. Narron (Raleigh), Sherry O'Neal (Greensboro), Carole Stack (Greensboro), Judy B. Sullivan (Rocky Mount), Jennifer L. Talley (Stoney Creek), T. William Tewes (Raleigh) and Rebecca B. Waddell (Greensboro).

The committee held its first meeting on June 9 at the Bar Center. Nine of the 13 members were able to attend. Also in attendance was Maryann Crea, then-director of CLE and Sharon Dow, assistant director of CLE. The committee members were full of energy and enthusiasm as we started planning for the year ahead.

The immediate goal of the committee was to plan a fall 1998 program. Our first seminar will discuss "Year 2000" issues and will be held at the Bar Center on Friday, Oct. 23. (See page 5.)

The 1999 Annual Meeting will be held in conjunction with the Legal Tech Expo (sponsored by the Law Practice Management Section). The Legal Tech Expo is planned for May 21-22 in Winston-Salem at the Benton Convention Center. Legal assistants are admitted free, along with a paying lawyer.

Each CLE section of the association operates with a three-year plan. The committee will be discussing its three-year plan at the next committee meeting. There are many opportunities for CLE ranging from traditional seminars to telephone conferencing. The committee will explore a variety of presentation formats and topics including substantive law, professionalism, leadership, ethics, technology and professional trends.

The committee is excited about the opportunities for education for our division. If any LAD members have ideas or suggestions regarding education, feel free to contact me at 1-800-662-8843.

— Camille Stell, CLE Committee Chair

Membership

Welcome to the Legal Assistants Division of the North Carolina Bar Association. We hope that you are already reaping the benefits of membership. At press time, we numbered 472 members across the state, and 441 of us have joined the various NCBA sections, thereby creating even more opportunities for the

exchange of knowledge and information.

While our numbers have grown steadily in these first few months, it is difficult to know how many eligible members have not yet joined the LAD. It is important for each of us to recruit new members.

Some of the many advantages of membership in the LAD include (1) opportunities to improve educational and skill levels; (2) the ability to track recent developments in case law and statutes; (3) the latest information in computer technology; (4) the pooling of knowledge and resources concerning streamlining work techniques to improve our performance while enhancing the reputation of our profession; and (5) receipt of all NCBA mailings, which can help you stay informed about the many opportunities available to its members.

Increasing our numbers can only be advantageous, for our division, the NCBA and the attorneys with whom we work each day. As the old saying goes, "There is strength in numbers."

I would encourage each of you to solicit eligible legal assistants for membership in our new division. Remember the eligibility requirements as you seek out these prospective members: (1) proven skill, education and experience; (2) supervision by a NCBA member; and (3) full-time employment (800 hours/year). If you need applications for membership, please contact Lynda Stogner at the Bar Center at 1-800-662-7407 or (919) 677-0561.

— Sarah Brown Otey, Membership Committee Chair

BARLINC

Greetings from the BARLINC Committee. Since the organizational meeting in May and council meeting in July, the committee has worked diligently in order to report its preliminary ideas to the council.

Our initial suggestions for the Web page include links to other paralegal associations and law-related sites, a tips/advice section, chat rooms and an online membership application. The Web page is for all LAD members and the committee welcomes your input.

We hope to have the Web page up and running in the near future. Visit the BARLINC site (www.barlinc.org) and feel free to share your ideas or suggestions. You may contact me via e-mail at aebm@wave-net.net or by telephone at (919) 774-6334.

— Angela Bardill-Maynard, BARLINC Committee Chair

Surfing
the 'Net?

Come ashore at BARLINC,
the NCBA's home on the World Wide Web
at www.barlinc.org

Putting the Rules Into Practice: Ethics and Risk Management

By Camille Stell

The North Carolina State Bar is the entity that establishes ethical rules for lawyers. The 1998 *North Carolina State Bar Lawyer's Handbook* is hot off the presses, so I quickly turned to the ethics rules to see where paralegals were mentioned. This is what I found:

N.C. Rules of Professional Conduct

Rule 5.3 Responsibilities Regarding Nonlawyer Assistants

With respect to a nonlawyer employed or retained by or associated with a lawyer:

- (a) a partner in a law firm shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that the nonlawyer's conduct is compatible with the professional obligations of the lawyer;
- (b) a lawyer having direct supervisory authority over a non-lawyer shall make reasonable efforts to ensure that the nonlawyer's conduct is compatible with the professional obligations of the lawyer; and
- (c) a lawyer shall be responsible for conduct of such a nonlawyer that would be a violation of the Rules of Professional Conduct if engaged in by a lawyer if:

- (1) the lawyer orders the conduct involved; or
- (2) the lawyer has direct supervisory authority over the nonlawyer and knows of the conduct at a time when its consequences can be avoided, but fails to take reasonable action to avoid the consequences.

Wow. That sounds important. But what does it mean? Quite simply, it means we have to follow the ethics rules that are in place for lawyers. Do you know where to find those rules? Do you know what they are? Are you sure your behavior meets the ethical guidelines established by the North Carolina State Bar?

To locate these ethics rules, turn to page 117 in the new *Lawyer's Handbook*, "Revised Rules of Professional Conduct of the North Carolina State Bar." These rules were overhauled in 1997; however, Rule 5.3 which deals with "nonlawyer assistants" (otherwise known as paralegals or legal assistants) remains the same.

The State Bar has another document which helps guide our behavior, "Guidelines for Use of Nonlawyers in Rendering Legal Services." These guidelines were revised in early 1998 by the State Bar Paralegal Committee and should be in printed form in a future edition of the *State Bar Quarterly* or the *State Bar Journal*.

This version of the guidelines includes for the first time an expanded opening statement providing a definition of paralegals or legal assistants, information about paralegal educational programs, certification and professional associations. Many lawyers will read these guidelines and learn information about our profession that has not been readily available to the bar.

I would encourage you to take a few minutes to refresh your recollection of these guidelines and the revised Rules of Professional Conduct. Make sure your behavior exceeds the minimums established by these rules. If you still need guidance on an ethics

issue, there are places paralegals can turn for help.

Call the State Bar and speak with Alice Neece Moseley or Deanna S. Brocker at (919) 828-4620. While the State Bar doesn't have any regulatory authority over paralegals, they are concerned with protecting the public. Making sure your behavior is above reproach is certainly in the public's best interest, so you may get some guidance from the State Bar.

There are also some interesting online sources. You can obtain ethics opinions through Lexis-Nexis, which has an ethics library. Some Internet sites include:

- The American Bar Association — www.abanet.org
- The Legal Ethics site — www.legalethics.com
- Cornell University Law School — www2.law.cornell.edu/cgi-bin/foliocgi.exe (This site has the ABA Model Rules in full text.)

Now you know where to find the rules. You know where to go for questions about the rules. Following are some tips for putting the rules into practice.

Practice Tips for Success

- Ask questions.
- Meet all deadlines assigned by attorneys.
- Always do quality work
- Be professional, even (or especially) when receiving "constructive criticism" from an attorney.
- Learn from the experienced paralegals in your firm - their successes as well as failures.
- Find a mentor if one doesn't find you.
- Be a leader early on. Volunteer for social projects or administrative projects such as selecting new computers in order to gain visibility and get to know the people in your firm.
- Pick up tips and advice from senior support staff.

Managing Work Assignments

- When receiving assignments, confirm the parameters of the assignment with the attorney in a memo or standard form.
- Spend the necessary time reviewing relevant portions of the file before embarking on the assignment, even if all of the time cannot be billed to the client.
- Make status reports to the attorney showing work product so he or she can make corrections or suggestions to keep the project on the correct track. The purpose of this review shouldn't be to micromanage your work, but rather to ensure the work is proceeding on schedule and the final product will be helpful in resolving the client's legal problem.

Tips for Avoiding Malpractice

- Be aware of the causes of malpractice and bar grievances so you can avoid making those mistakes - missed deadlines, poor client relations, failed systems.
- Use the firm calendar system.
- Clear all clients through the firm conflicts of interest system.
- Practice good client relations.
- Return telephone calls. ♦

Stell is a risk management paralegal with Lawyers Mutual Liability Insurance Company of North Carolina in Cary.

Upcoming Events & Important Dates

Sept. 25 Deadline for submission of articles for fall issue of *LAD News*
Oct. 6 Council Meeting, Winston-Salem
Oct. 23 CLE Seminar: "Year 2000 Issues" (see page 5)
May 21-22 LAD Annual Meeting & Seminar, Winston-Salem

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