



# UNBUNDLED LEGAL SERVICES IN THE NEW NORMAL

## Virtual Conference April 20–22

IAALS, The Chicago Bar Foundation, the ABA Standing Committee on the Delivery of Legal Services, and the Self-Represented Litigation Network (SRLN) are hosting a three-day virtual educational event that will focus on the major hows and whys of supporting and implementing the practice of unbundled legal services both during and after the COVID-19 pandemic. Sessions will offer content relevant to members of the private bar, legal aid, legal academics, judicial officers, court administrators, those involved with court-annexed projects, and other interested parties. This conference, available at no charge for registration, will provide an opportunity for attendees to discuss concerns, share success stories, and explore new ideas with colleagues and peers. Our national outreach has invited a broad audience to participate in the program.

## Tuesday, April 20

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### *12 p.m. MDT – Brief Welcome*

- Michael Houlberg, IAALS

### *12 p.m.–1:15 p.m. MDT – Session 1: Addressing Ethical and Malpractice Concerns (Approved for 75 minutes CLE Ethics Credit)*

The panel is moderated by Natalie A. Knowlton, director of special projects at IAALS. The panel includes Jessica E. Yates, Attorney Regulation Counsel for the Colorado Supreme Court; Ellyn Rosen, the Regulation and Global Initiatives Counsel of the American Bar Association Center for Professional Responsibility; and Mark Bassingthwaite, Risk Manager with ALPS.

The program will address ethical and malpractice concerns associated with unbundling. Fears of ethical violations and of being exposed to malpractice claims are among some of the more commonly voiced reasons that attorneys don't offer unbundled legal services. Topics that will be discussed include ways in which to effectively limit the scope of representation, documentation of the division of discrete tasks assigned to the attorney and the client, respectively, and the nature of disciplinary complaints levied against attorneys engaged in limited scope representation.

Moderator and panel facilitator:

- Natalie A. Knowlton, IAALS

Panelists:

- Mark Bassingthwaite, ALPS
- Ellyn S. Rosen, Regulation and Global Initiatives, American Bar Association
- Jessica E. Yates, Office of Attorney Regulation, Colorado Supreme Court

*1:15–1:30 p.m. MDT – Break*

*1:30–2:45 p.m. MDT – Session 2: Unbundling the Court System (Approved for 75 minutes of CLE General Credit)*

This panel includes Hon. Keven O’Grady, district judge for the 10th Circuit of Kansas; Stacey Marz, the administrative director of the Alaska Court System; and Pat Wrona, the director of legal services at CARPLS Legal Aid. The program will look at "unbundling the court system." Unbundled self-help and legal services can be powerful access-to-justice tools, especially when they are fully integrated into the court ecosystem. Panelists will share examples of successful programs and policies that have brought unbundled services directly into the courthouse, as well as strategies for cultivating support for unbundling among court stakeholders.

Moderator and Panel Facilitator:

- Samira Nazem, The Chicago Bar Foundation

Panelists:

- Stacey Marz, Alaska Court System
- Hon. Keven O’Grady, Tenth Judicial District, Kansas
- Patricia Wrona, CARPLS Legal Aid

*2:45–3 p.m. MDT – Wrap-up and Concluding Remarks for the Day*

## Wednesday, April 21

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### *12 p.m. MDT – Brief Welcome*

- Michael Houlberg, IAALS

### *12 p.m.–1:15 p.m. MDT – Session 3: Cyborg Lawyers and Unbundled Legal Services (Approved for 75 minutes of CLE General Credit)*

This panel is moderated by Allen Rodriguez, the founder of ONE400. Panelists include Brooke Moore, founder of MyVirtualLawyer.com; Lauren Lester, a legal practitioner and founder of Lester Law LLC; and Scott Kelly, a legal innovator and founder of AfterPattern. This program examines how legal technology can advance access to justice. “Robot lawyers” are probably not going to happen any time soon. However, cyborg lawyers—human lawyers that are enhanced by technology—are currently in place and are delivering legal services. This session will bring together technology creators that have developed products that can be used to deliver unbundled legal services as well as some cyborg lawyers currently using these tools.

Panel Facilitator:

- Sarah Glassmeyer, ABA Center for Innovation and Standing Committee on the Delivery of Legal Services

Moderator:

- Allen Rodriguez, ONE400

Panelists:

- Scott Kelly, AfterPattern
- Lauren Lester, Lester Law LLC
- Brooke Moore, MyVirtualLawyer

### *1:15–1:30 p.m. MDT – Break*

### *1:30–2:45 p.m. MDT – Session 4: New Frontiers in Unbundling: Innovations Are Yielding Proven Results & New Business Opportunities (Approved for 75 minutes of CLE General Credit)*

This panel will be facilitated by Michael Houlberg of IAALS and moderated by Katherine Altener, the consulting senior strategic advisor to the Self-Represented Litigation Network (SRLN). Panelists include Erin Levine, the CEO and founder of Hello Divorce; M.J. Cartwright, the CEO of Court Innovations; and Marquita Green, the family law low bono director at Jacksonville Area Legal Aid, Inc. (JALA). Unbundling opens new markets for entrepreneurial lawyers, and is also a powerful tool to advance innovation for increased access to justice and better outcomes. This session will feature leading innovators who will share successful and proven strategies that are transforming the provision of legal services.

Attendees will learn about new frontiers in unbundling from numerous perspectives—whether that means supercharging justice tech platforms; opening new markets through legal aid overflow; combining unbundled with mediation to yield more settlements than double full-representation cases; or exploring the potential of combining unbundling with the many new applications of ODR proliferating among courts, private practices, and justice organizations. Taken together, these innovations demonstrate that, in today’s world, high-quality legal services necessarily include unbundled legal services to give clients the help they need, when they need it, and in a format they can use. After attending this session, participants will be able to identify a number of new business opportunities to grow their practices, better serve clients, and improve justice in their communities.

Panel Facilitator:

- Michael Houlberg, IAALS

Moderator:

- Katherine Alteneder, Self-Represented Litigation Network

Panelists:

- MJ Cartwright, Court Innovations
- Marquita Green, Jacksonville Legal Aid, Inc.
- Erin Levine, Hello Divorce
- Margaret Malloy, Office of Pro Se Litigation for the United States District Court for the Southern District of New York

*2:45–3 p.m. MDT – Wrap-up & Concluding Remarks for the Day*

## Thursday, April 22

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### *12 pm. MDT – Brief Welcome*

- Michael Houlberg, IAALS

### *12–1:15 p.m. MDT – Session 5: Unbundling 2.0: How to Take Your Practice to a New Level (Approved for 75 minutes of CLE General Credit)*

This panel is moderated by Jessica Bednarz, director of The Chicago Bar Foundation. Panelists include Laura O'Bryan, the co-owner of MyVirtualLawyer; Alyease Jones, of the Law Office of Alyease Jones; and Andrea McGinn, the co-founder of the Law Shop by Skogerson McGinn LLC. Many attorneys are discovering the tremendous value they can offer legal consumers by offering unbundled legal services. But how does an attorney take unbundled services to the next level and turn them into a profit-generating piece of their legal services portfolio? This session will focus on the business case for unbundled services and how attorneys can identify, create, and market and profit-generating unbundled service. Topics covered include settling upon a legal services menu, profitability of the model and pricing, how to market your services in order to increase access to justice, how to leverage technology to deliver unbundled legal services, and operational decisions that decrease costs and increase the value of the services provided.

Moderator and Panel Facilitator:

- Jessica Bednarz, The Chicago Bar Foundation

Panelists:

- Alyease Jones, The Law Office of Alyease Jones
- Andrea McGinn, The Law Shop by Skogerson McGinn LLC
- Laura O'Bryan, MyVirtualLawyer

### *1:15–1:30 p.m. MDT – Break*

### *1:30–2:45 p.m. MDT – Session 6: Meet & Greet*

This session is devoted for attendees to meet and reacquaint themselves with other professionals interested in unbundled legal services. There will be multiple breakout rooms and attendees will have the flexibility to switch between rooms or stay in the same room the entire session.