UNBUNDLED LEGAL SERVICES:











1988 FTC INVESTIGATION

of "Unbundled" Real Estate Brokers





"UNBUNDLING'S ORIGIN AND PROMOTION

ABA Standing Committee on Delivery Of Legal Services (1992)



CONFERENCE PRESENTATIONS



• ARTICLES

LIMITED SCOPE REPRESENTATION:

A NEW WAY OF THINKING ABOUT ACCESSIBLE LEGAL SERVICES

By Eileen Pruett and Bert Tiger Whitehead*

REPORTS, RESEARCH, TRAINING

Trial Court of Massachusetts

Limited Assistance Representation Training Manual

*NATIONAL UNBUNDLING CONFERENCE

Baltimore, 2000



Changing the Face of Legal Practice;

"Unbundled" Legal Services

Welcome to UnbundledLaw.org

The best and most complete collection of online resources for limited scope representation is the <u>Unbundling Resource Center</u> maintained by the ABA's Standing Committee on the Delivery of Legal Services. You will find fee agreements, articles, reports, forms, ethics opinions, best practices, and court rules organized by state, as well as a wealth of other materials.

A complete set of Risk Management Materials is available here for family law (click here) and civil (click here) limited scope practice. They are free for download and practitioners are encouraged to tailor them to your own individual practice. If used as directed, including close adherence to the best practices, you have to work hard to mess this up. Click here for FAQ

For a free limited scope three hour training courtesy of PLI (Practising Law Institute), <u>click here</u>. CLE credit is available for most states, including one hour of ethics.

Click here for our old website and information on the Baltimore Conference

ABA AND STATE BAR INITIATIVES

AMERICAN BAR ASSOCIATION

STANDING COMMITTEE ON THE DELIVERY OF LEGAL SERVICES

REPORT TO THE HOUSE OF DELEGATES

RESOLUTION

- 1 RESOLVED, That the American Bar Association urges
- 2 courts and other governmental entities, bar associations,
- non-profit organizations and entrepreneurial entities that
- 4 make forms for legal services available to individuals
- 5 through the Internet to provide clear and conspicuous
- direction on how people can access a lawyer to provide
- 7 <u>assistance</u> with their legal matters.

TOOLBOXES FOR LAWYERS



Options for CLIENTS, COURTS & COUNSEL

ETHICAL RULE CHANGES

ABA WHITE PAPER (2014)

Introduction

This white paper has been prepared by the American Bar Association's Standing Committee on the Delivery of Legal Services. The purpose of the paper is to provide policy-makers with information and analysis on the ways in which various states are formulating or amending rules of professional conduct, rules of procedure and other rules and laws to enable lawyers to provide a limited scope of representation to clients who would otherwise proceed on a pro se basis, and to regulate that representation.

ENACTMENT OF MODEL RULES 1.2C AND 6.5 IN MOST STATES

Policies to enable lawyers to provide limited scope representation of civil litigants are being advanced through two concurrent initiatives. One is the result of Ethics 2000, the ABA endeavor to review and amend the ABA Model Rules of Professional Conduct, which began in 1997 and concluded with adopted revisions to the Model Rules in 2002.14 States are in the process of reviewing the revised Model Rules, and adopting, adapting or rejecting the specific changes, including Model Rules 1.2(c) and 6.5.

*OVERHAUL OF STATE POLICIES TOWARD UNBUNDLING

The second initiative involves individual state collaborative analyses of limited scope representation policies. Rather than focusing on the ethics rules as a whole, as Ethics 2000 did, these initiatives are statewide efforts that examine the dynamics of self-represented litigation. Many of these state initiatives stem from the 1999 National Conference on Pro Se Litigation, produced by the American Judicature Society.

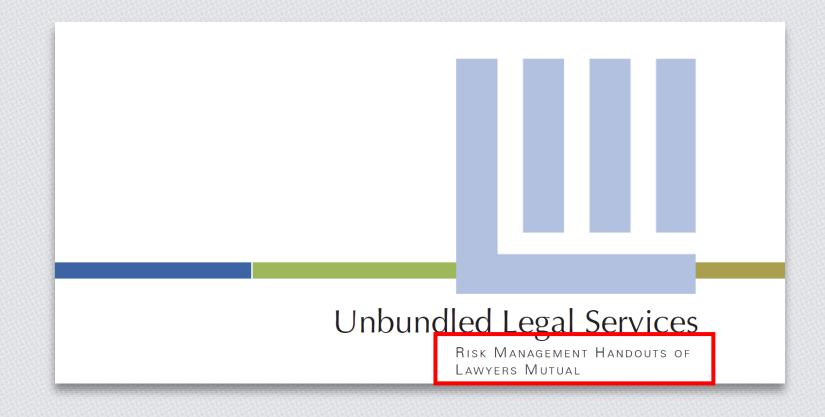
5 AREAS IF POLICY CHANGE

The policy issues that have been addressed <u>as a result of</u> both of these initiatives thus far are:

- Defining the scope of representation;
- Clarifying communications between counsel and parties;
- Creating parameters for the lawyer's role in document preparation, including disclosure of the lawyer's assistance;
- Governing the entry of appearances and withdrawals for limited scope representation; and
- Excusing conflicts checks for limited services programs.

 These reports express a common need to address the changes in the delivery of legal services, most often with rules that give a greater certainty to the process.

SUPPORT BY LEGAL MALPRACTICE INSURERS



SPEECHES, BLOGS, AND TRAININGS

Q&A: Sue Talia, National Limited Scope Representation Advocate

By Hello Divorce Team in Family Law | Posted September 21, 2017



M. Sue Talia

Hello Divorce CEO Erin Levine recently had the privilege of speaking with M. Sue Talia, an early advocate for unbundled legal services. Her pioneering efforts helped make flat fee legal services a reality, in spite of significant pushback from big city Bar Associations. Activists like Ms. Talia made our

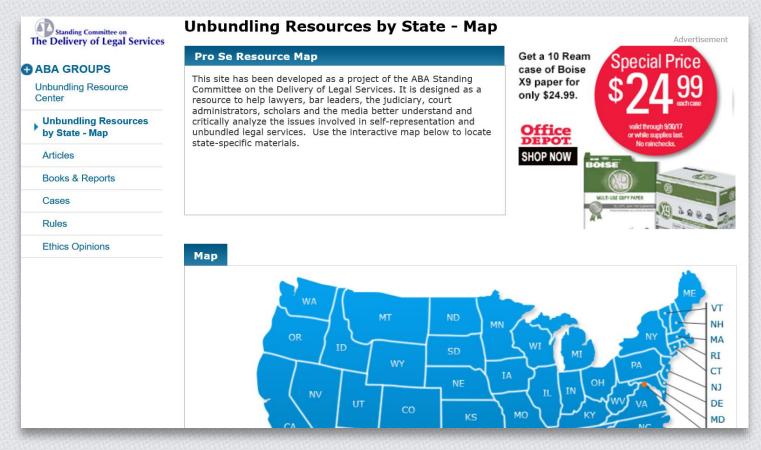
THE PRESENT



Contact

Erin@hellodivorce.com twitter.com/hellodivorce facebook.com/hellodivorce instagram.com/hellodivorce pinterest.com/hellodivorce

GROWTH OF UNBUNDLING

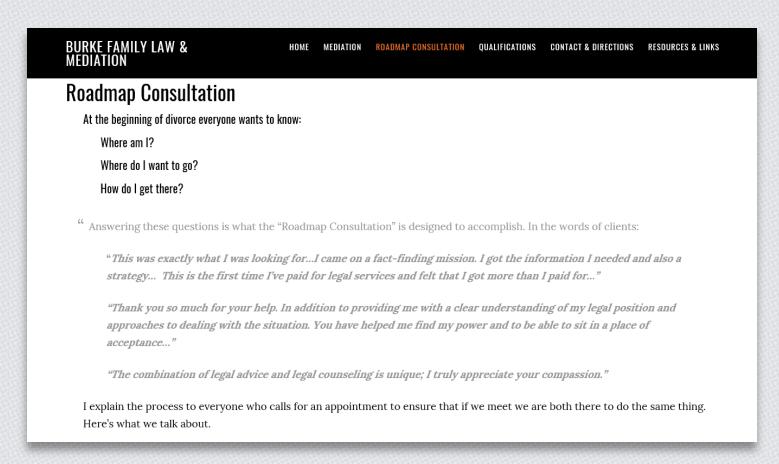


LINK TO MAP:

https://www.americanbar.org/groups/delivery_legal_services/resources/pro_se_unbundling_resource_center/pro_se_resources_by_state_map.html

Brian Burke, Santa Barbara, CA

http://burkefamilylaw.com/roadmap-consultation

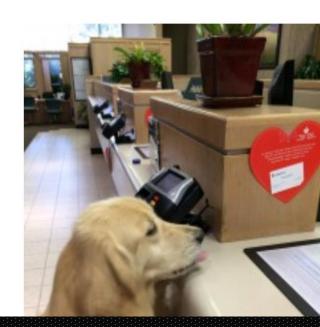


BURKE FAMILY LAW & MEDIATION

HOME MEDIATION ROADMAP CONSULTATION QUALIFICATIONS CONTACT & DIRECTIONS RESOURCES & LINKS

If you've made an appointment, you should have been asked for your preferences regarding the presence of a dog.





Gevutrz Menashe & Howe, Portland, OR

http://www.gevurtzmenashe.com/family law/



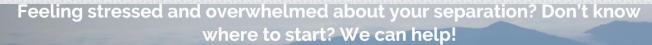
Justice Café, Atlanta, GA

http://www.justicecafe.com/



The Neutral Zone, Toronto, Ontario

http://www.theneutralzone.info



We provide information and answer your questions about property division, support guidelines and how to minimize the impact of separation on your family. After this flat fee two-hour session, you will be able to identify next steps and decide how to move forward. Taking control of your separation process at the outset will save you time and money.

The Neutral Zone™



What We Do

At The Neutral Zone, we help you get started by providing information tailored to your individual and family situation. You will learn about: Financial issues related to property and support Considerations in developing age appropriate parenting plans The impact of Read More



How We Do It

Early Neutral Information Meeting What you need to know to figure out what you need to do ... During this 2 hour meeting, you and your partner will meet with experienced neutral family, financial and legal professionals who will provide ... Read More

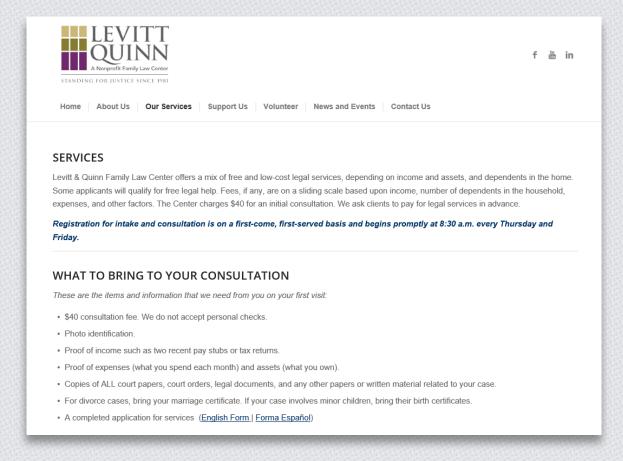


Who Can Help

How can various professionals help us move forward after our information meeting? Financial Professionals Collect and understand the financial information and implications for the future Explore Options for settling your property and sharing your income ... Read More

Levitt and Quinn, Los Angeles, CA

http://levittquinn.org/services/

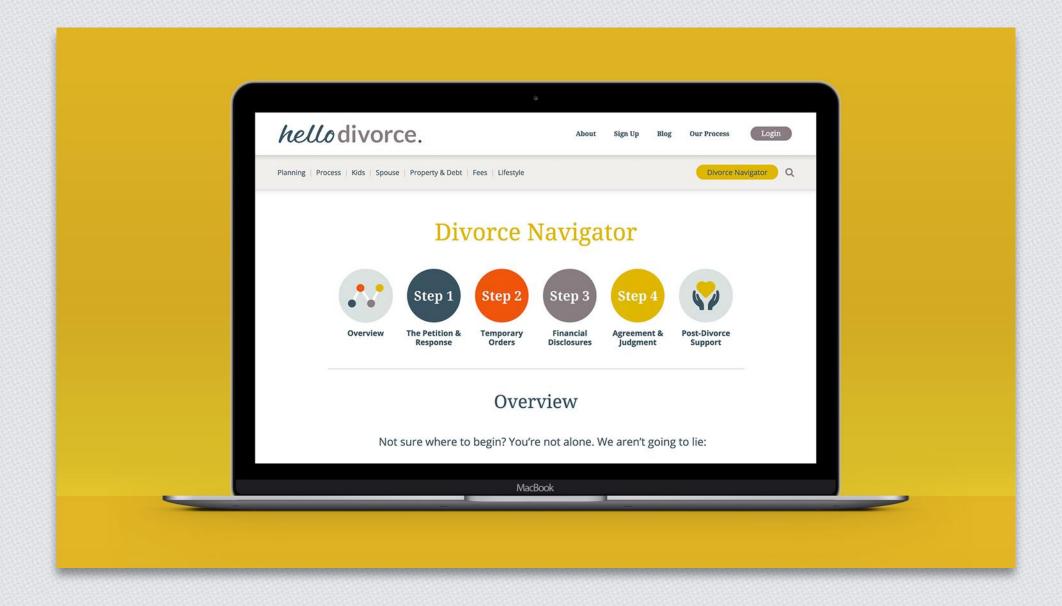


hellodivorce.

Founded in 2017 | Oakland, CA

Unbundled Legal Services: California Divorce

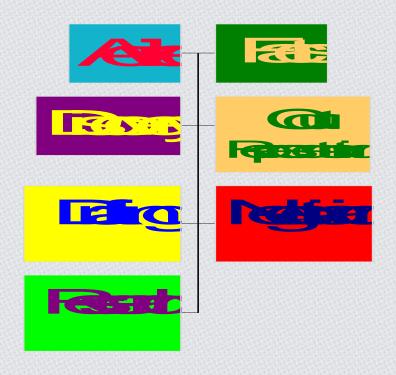
www.hellodivorce.com



*THE FUTURE OF UNBUNDLED LEGAL SERVICES



2027 UNBUNDLED LEGAL SERVICESWILL BE BASED OUR WORK IN 2017



UNBUNDLING IS MORE THAN IMPROVING LEGAL ACCESS.....

*UNBUNDLING IMPROVES THE LEGAL PROFESSION'S REPUTATION

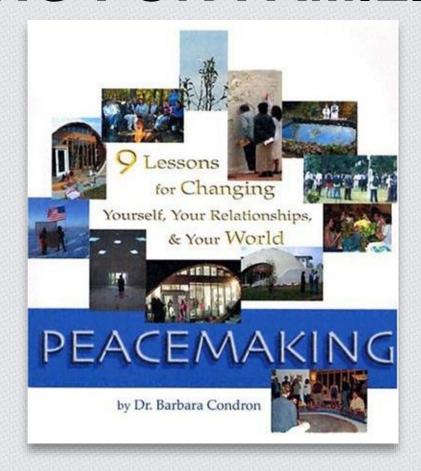
*UNBUNDLING IMPROVES PROFITABILITY AND QUALITY OF LIFE OF LAWYERS



*UNBUNDLING WILL ACCELERATE THE GROWTH OF MEDIATION



*UNBUNDLING CAN ENHANCE PEACEMAKING FOR FAMILIES



THE FOLLOWING FURTHER REFORMS WILL INCREASE UNBUNDLING'S IMPACT

Juvenile & Family Court Programs Division, Oregon Judicial Department - 08/18/2015

SFLAC Recommendations Re: Unbundled Legal Services	OSCA Status Report
Enact Unbundling-friendly court rules.	The Unbundled Legal Services UTCR Work Group met four times to discuss changes to the UTCRs that would facilitate limited scope representation. The Work Group membership included:
	Unbundled Legal Services UTCR Work Group Judge Timothy Gerking, Jackson County Circuit Court Judge Ann Marie Simmons, Douglas County Circuit Court Judge Karrie McIntyre, Lane County Circuit Court Judge Karrie McIntyre, Lane County Circuit Court Joshua D. Kadish, Partner, Wyse Kadish LLP, Portland, OR Leola McKenzie, Director, Juvenile & Family Court Programs Division, OJD Samantha Benton, Family Law Program Analyst, Juvenile & Family Court Programs Division, OJD Holly Rudolph, Forms Manager, Office of Education, Training, and Outreach, OJD Elizabeth Vaughn, Family Court Specialist, Clackamas County Circuit Court Helen Hierschbiel, General Counsel, Oregon State Bar Robin Selig, Support Unit Attorney, Oregon Law Center The Work Group discussed many facets of unbundled legal services including the ethics of
	providing limited-scope representation, nationwide trends in limited scope representation, the role of the court in limited scope representation, and how to encourage practitioners to provide limited scope representation. The final proposal to the UTCR Committee: adds language to UTCR Chapter 8 (Domestic Relations Proceedings) that provides guidance on notice and termination of limited scope representation when an attorney appears in court with a client and adds language clarifying service requirements; suggests that the UTCR committee enact unbundling-friendly rules for other practice areas; and suggests that the UTCR review the necessity of the Certificate of Document Preparation (UTCR 2.010(7)). The next meeting of the UTCR Committee is October 16, 2015.
Develop and make available user-friendly court forms that facilitate lawyers making and withdrawing from limited scope appearances.	The Unbundled Legal Services UTCR Work Group created two forms: (1) Notice of Limited Scope Representation; and (2) Termination of Limited Scope Representation The new forms will be vetted through the OJD Law and Policy Work Group, and will be submitted with the UTCR revisions to the UTCR Committee for review.

LAWYERS WILL BE REQUIRED TO DISCUSS UNBUNDLING AS PART OF REQUIRED INFORMED CONSENT



STATES WILL PERMIT LAWYERS, TRAINED LEGAL TECHNICIANS, AND MEDIATORS TO DRAFT FINAL AGREEMENTS AND COURT DOCUMENTS

AGREEMENT			
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LAWYERS WILL BE REQUIRED TO HAVE UNBUNDLED TRAINING TO GET A LICENSE



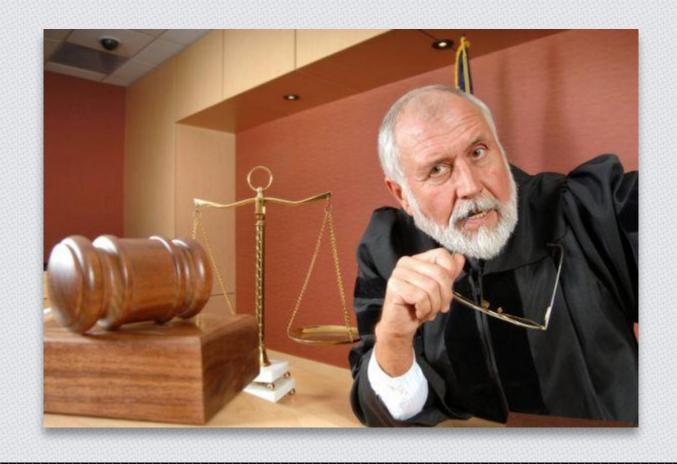
LIMITED SCOPE DELIVERY OF LEGAL SERVICES WILL BE ONE OF THE MOST IMPORTANT SECTIONS WITHIN THE ABA



*10 COACHING ROOMS FOR EVERY 1 TRIAL COURTROOM



JUDGES AND COURT STAFF WILL BE TRAINED IN LIMITED SCOPE DELIVERY



COURTS WILL SEND LETTERS TO PARTIES ABOUT UNBUNDLING



The Superior Court

FAMILY LAW DIVISION
111 NORTH HILL STREET
LOS ANGELES. CALIFORNIA 90012
CHAMBERS OF
THOMAS T. LEWIS
SUPERVISING JUDGE-FAMILY LAW

TELEPHONE

Dear Parties:

I would like you to know that our court weeks to help you and your family. I coderstand that you may be going through a confusing and difficult time and we have a morne of resources to the help you. The Court's wheeling injustable Court, and court in court process. Additionally, the Court has no easy-to-use web portal that allows parties needing language assistance in Family Law cases to make a site interpreting expense of charge in advance of their court bearing. The interpreting expense from its washable in help light has well as in several other languages. The interpreting expense in the interpreting expense and the interpreting in the interpreting the washable. While the court will make every effort to locate an interprete for the date and time of the hearing, it cannot guarantee that one will be available, they may access the interpreter reserves portally visiting the court's webliet as applications; and collection on the Language access sharkes con-

You may have a dispute with your spouse or the other party in the case regarding where your children will live, what support will be provided or how you will divide your property. You have the right to have a court hearing and have a judicial officer decide these matters for you. If you refain of your spouse or other party in this matter, there are ways to first phase accomant into court and get the protections allowed by low.

However, going to court is not the only way to resolve family law disputes. Many families find methods to agree to their own solutions. Some other was facility to be a support of their own solutions. Some other was provided by the support of their own solutions. You and spouse can work with a mediator without attorneys or have a lawyer cann with you. Or you can see collaborative low in which the leaves may work with financial and mental health professionals to use a team approach to help your family settle out of court. If you come to court, the out may be able to refly you to an expect authorizer.

Using these and other tools to answer the questions you have and find solutions that both sides agree to may be better for several reasons: 3) You will directly participate in finding solutions; 2) You may be able to resolve your dispute sooner; 3) it may be much less expensive; 4) You may expenses with a better relationship with the other party; 5) You will lakely find at less stressly than court and your children may feel less stress.

You can speak with your attorney, if you have one, about all of these methods of resolving your case. Some lawyers may offer you a free or low cost consultation to help you decide what process is best for you and your family.

I recommend that you focus on what is most important; moving to the nest phase of your life. Many people spend time, effort and money attempting to obtain-satisfaction by dragging out the dispute with the other party, but this does not guarantee either party will be fully satisfied with the outcome and may result in a say that does not benefit either of you.

If you have children, you must be particularly careful in choosing how to precent. Everything you can do to avoid unnecessarily toolving them in the dispose or engaging condition connecting them will benefit them and you. A secondarily agreement does not need to be perface. For the mediation of disposes regarding your children's and how they will spend time with each parent after dispose, the court offers a fee mediation service through confidence in the contraction of the contractio

Please save this letter and use it as a guide to the various alternatives available to you.



Using a family law attorney can be very important to you. If you cannot afford a deposit (retainer) and are prepared to do some of the legal work yourself, many private attorneys and non-profit organizations offer unbundled legal services, also called Limited Scope Representation. If you cannot afford an attorney at all and you need to do all of the work yourself to complete your case, you can get guidance and information about workshops and assistance available at self-help centers in courthouses by visiting the court's website at www.lacourt.org and

clicking on the Self-Help tab.

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INCENTIVES TO USE LIMITED SCOPE REPRESENTATION



VOLUNTEER ELDER DOCENTS WILL BE VOLUNTEER DOCENTS TO HELP SRL'S



THE FUTURE IS HERE!!

• MARIA



• SARAH





