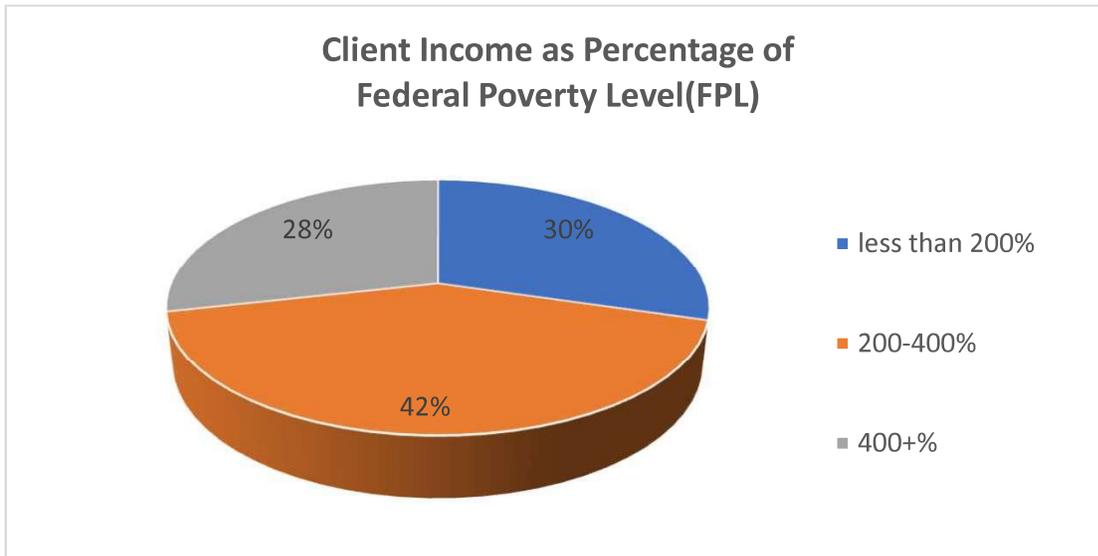


CLIENT DATA FROM FOUR LLLTS

AVG # months in practice	Total Clients retained	Total Consults only	Total Clients Assisted	Client Income as Percentage of Federal Poverty Level(FPL)			AVG % Clients of color
				less than 200%	200-400%	400+%	
52	353	209	562	30%	42%	28%	30%

Type of Service Provided by LLLT to Client*	
Divorce or Legal Separation with Children	146
Divorce or Legal Separation without Children	86
Child Support Modification	31
Parenting Plan Modification	15
Establish Parenting Plan/Child Custody	45
Paternity	2
Non-Parental Custody	2
Domestic Violation Protection Order	10

* Total does not match total clients retained, due to difference in types of service reported



Legal Regulation Innovation Table

Locale	Rules and Innovation
United States	
Utah	LPP – Licensed Paralegal Practitioner - several already licensed ¹ Office of Legal Services Innovation - Regulatory Sandbox: now active ²
Arizona	LP - Legal Paraprofessionals – adopted by Supreme Court ³ Non-Lawyer Law Firm Ownership ⁴
Minnesota	Legal Paraprofessional Pilot Project - runs March 2021-March 2023 ⁵
California	Paraprofessional Program - Licensing Requirements adopted February 2021 ⁶
Colorado	Paraprofessionals and Legal Services (PALS) Subcommittee - actively working on pilot project for LPPs ⁷
North Carolina	North Carolina Legal Technician – proposed to NC Supreme Court, presented March 23, 2021 ⁸
Oregon	Paraprofessional Licensing Implementation Committee - actively working to define license; approved by OR BOG in 2019 ⁹
New York	Court Navigators - since 2014 ¹⁰ , proposed training social workers to provide legal services, expanding role of navigators Dec 2021 ¹¹
New Mexico	Court Navigator Pilot Program – adopted by Order No. 19-8110 ¹²
Illinois	Licensed Paralegal – Optimizing Committee of Bar proposed rule September 28, 2020 ¹³
Connecticut	State of the Legal Profession Task Force – exploring limited licensing ¹⁴
Florida	Advanced Florida Registered Paralegals – delegated for further study by FL BOG ¹⁵
Montana	A task force is exploring limited licensing ⁸

¹ <https://www.utcourts.gov/legal/lpp/>

² <https://sandbox.utcourts.gov/>

³ <https://www.azcourts.gov/Licensing-Regulation/Legal-Paraprofessional-Program>

⁴ <https://www.azcourts.gov/Licensing-Regulation/Alternative-Business-Structure>

⁵ <https://www.mncourts.gov/Implementation-Committee.aspx>

⁶ <https://paraprofessional.osbar.org/files/Paraprofessional-Program-Licensing-Requirements-Adopted-February-2021-1.pdf>

⁷ <https://www.coloradosupremecourt.us/AboutUs/Subcommittees.asp>

⁸ <https://ncbarblog.com/pd-limited-licensing-proposal-watch-the-presentation-to-the-state-bar-on-mar-23-2021/>

⁹ <https://paraprofessional.osbar.org/>

¹⁰ <https://www.nycourts.gov/courts/nyc/housing/rap.shtml>

¹¹ https://www.nycourts.gov/LegacyPDFS/publications/RWG-RegulatoryInnovation_Final_12.2.20.pdf

¹² <https://iaals.du.edu/blog/new-mexico-implement-court-navigators-pilot-program>

¹³ <https://chicagobarfoundation.org/pdf/advocacy/task-force-report.pdf>

¹⁴ <https://www.ctbar.org/members/sections-and-committees/task-forces/state-of-the-legal-profession-task-force#:~:text=The%20CBA%20has%20convened%20a,and%20better%20manage%20legal%20dockets.&text=To%20accomplish%20these%20goals%2C%20the,in>

¹⁵ <https://www.floridabar.org/the-florida-bar-news/advanced-florida-registered-paralegals-plan-gains-conceptual-approval-from-bars-rules-committee/>

Legal Regulation Innovation Table

Virginia	A task force is exploring limited licensing ⁸
Pennsylvania	A task force is exploring limited licensing ⁸
Vermont	A task force is exploring both document preparers and limited licensing ⁸
Nevada	Document Preparer Program, licensed legal document preparers - since 2013 ¹⁶
Canada	
British Columbia	Licensed Paralegal Task Force Innovation Sandbox ¹⁷
Ontario	Licensed Paralegals, now considering Family Legal Service Providers (FLSP) ¹⁸
Manitoba	Special Committee on Alternative Legal Services Providers ¹⁹
Nova Scotia	Public Navigator Program ²⁰
Saskatchewan	Investigating limited licensing ²¹

¹⁶ <https://www.leg.state.nv.us/nrs/NRS-240A.html>

¹⁷ <https://www.lawsociety.bc.ca/our-initiatives/innovation-sandbox/>

¹⁸ <https://lso.ca/about-lso/initiatives/family-law-action-plan>

¹⁹ <https://lawsociety.mb.ca/about/lsm-initiatives/alternative-legal-services-providers/>

²⁰ <https://www.legalinfo.org/navigator/public-navigator-training>

²¹ <https://www.lawsociety.sk.ca/initiatives/access-to-justice/future-of-legal-services/>

Sunset

LLLT DRAFT BUSINESS PLAN FOR DISCUSSION ONLY												
REVENUE	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030	
Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
License Fee	\$ 7,203	\$ 12,382	\$ 15,388	\$ 16,638	\$ 20,047	\$ 23,168	\$ 23,811	\$ 24,264	\$ 24,725	\$ 25,195	\$ 25,675	
LLLT Education Fee (CLEs and practice a	\$ 9,580	\$ 2,319	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Exam Application Fee	\$ 5,355	\$ 17,955	\$ 15,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Waiver Application Fee	\$ 150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
MCLE LATE FEE	\$ 150	\$ 300	\$ 300	\$ 450	\$ 450	\$ 600	\$ 600	\$ 750	\$ 750	\$ 750	\$ 750	
Education approval fee (core education)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
TOTAL REVENUE	\$ 22,438	\$ 32,956	\$ 31,438	\$ 17,088	\$ 20,497	\$ 23,768	\$ 24,411	\$ 25,014	\$ 25,475	\$ 25,945	\$ 26,425	
DIRECT COSTS	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY2027	FY 2028	FY 2029	FY 2030	
LLLT Board	\$ 5,656	\$ 2,450	\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,311	\$ 1,351	\$ 1,391	\$ 1,433	\$ 1,476	\$ 1,520	
LLLT Outreach	\$ 1,507	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
LLLT Exam Writing	\$ 8,373	\$ 6,287	\$ 9,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Facility, Parking and Food (LLLT Exam)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Staff Travel/Parking	\$ 102	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
LLLT Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Postage	-	-	-	-	-	-	-	-	-	-	-	
Licensing Forms	\$ -	\$ 4	\$ 5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
TOTAL DIRECT COSTS	\$ 15,638	\$ 8,741	\$ 10,205	\$ 1,236	\$ 1,273	\$ 1,311	\$ 1,351	\$ 1,391	\$ 1,433	\$ 1,476	\$ 1,520	
NET DIRECT INCOME/LOSS	\$ 6,800	\$ 24,215	\$ 21,233	\$ 15,852	\$ 19,224	\$ 22,457	\$ 23,061	\$ 23,623	\$ 24,042	\$ 24,470	\$ 24,905	
INDIRECT COSTS	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY2027	FY 2028	FY 2029	FY 2030	
Salary and benefits	\$ 136,939.00	\$ 88,451.00	\$ 17,157.12	\$ 17,671.84	\$ 18,201.99	\$ 18,748.05	\$ 19,310.49	\$ 19,889.81	\$ 20,486.50	\$ 21,101.10	\$ 21,734.13	
Other indirects	\$ 38,688.00	\$ 23,292.00	\$ 6,125.98	\$ 6,309.76	\$ 6,499.06	\$ 6,694.03	\$ 6,894.85	\$ 7,101.70	\$ 7,314.75	\$ 7,534.19	\$ 7,760.21	
TOTAL INDIRECT COSTS	\$ 175,627.00	\$ 111,743.00	\$ 23,283.11	\$ 23,981.60	\$ 24,701.05	\$ 25,442.08	\$ 26,205.34	\$ 26,991.50	\$ 27,801.25	\$ 28,635.28	\$ 29,494.34	
NET INCOME/LOSS (all revenue and direct and indirect costs as currently calculated)	\$ (168,827.00)	\$ (87,528.19)	\$ (2,049.98)	\$ (8,129.42)	\$ (5,476.82)	\$ (2,985.22)	\$ (3,144.46)	\$ (3,368.91)	\$ (3,759.11)	\$ (4,165.63)	\$ (4,589.06)	
Salaries and Benefits Base	\$ 102,193.28	\$ 83,287.00	\$ 85,785.61	\$ 88,359.18	\$ 91,009.95	\$ 93,740.25	\$ 96,552.46	\$ 99,449.03	\$ 102,432.50	\$ 105,505.48	\$ 108,670.64	
FTE's	1.34	1	0.20	0.20	0.20	0.20	0.20	0.20	0.20	0.20	0.20	
Overhead Base	\$ 28,871.64	\$ 29,737.79	\$ 30,629.92	\$ 31,548.82	\$ 32,495.29	\$ 33,470.15	\$ 34,474.25	\$ 35,508.48	\$ 36,573.73	\$ 37,670.94	\$ 38,801.07	

Sunset

Assumptions:

1. No new examinees or LLLTs after 2022; 89 LLLTs paying full annual licensing fees starting 2025, 10 paying \$120 annual inactive fee
2. 3% annual increase in LLLT Board expenses
3. 2% annual license fee increase (Social Security Cost of Living Adjustment (COLA) average over last 20 years (2001 – 2020) is 2%)
4. Salaries & Benefits Base and Overhead Base includes 3% annual increase

Continue Licensing in Family Law

LLLT DRAFT BUSINESS PLAN FOR DISCUSSION ONLY

REVENUE	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
License Fee	\$ 7,203	\$ 12,382	\$ 15,388	\$ 17,580	\$ 23,386	\$ 30,541	\$ 38,557	\$ 49,252	\$ 62,516	\$ 79,615	\$ 99,585
LLLT Education Fee (CLEs and practice a	\$ 9,580	\$ 2,319	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Exam Application Fee	\$ 5,355	\$ 17,955	\$ 15,750	\$ 6,300	\$ 15,750	\$ 25,125	\$ 31,425	\$ 34,725	\$ 40,800	\$ 49,950	\$ 62,025
Waiver Application Fee	\$ 150	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
MCLE LATE FEE	\$ 150	\$ 300	\$ 300	\$ 450	\$ 450	\$ 600	\$ 600	\$ 750	\$ 750	\$ 750	\$ 750
Education approval fee (core education)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL REVENUE	\$ 22,438	\$ 32,956	\$ 31,438	\$ 24,330	\$ 39,586	\$ 56,266	\$ 70,582	\$ 84,727	\$ 104,066	\$ 130,315	\$ 162,360
DIRECT COSTS	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
LLLT Board	\$ 5,656	\$ 2,450	\$ 1,200	\$ 1,236	\$ 1,273	\$ 1,311	\$ 1,351	\$ 1,391	\$ 1,433	\$ 1,476	\$ 1,520
LLLT Outreach	\$ 1,507	\$ -	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500
LLLT Exam Writing	\$ 8,373	\$ 6,287	\$ 9,000	\$ 9,000	\$ 9,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Facility, Parking and Food (LLLT Exam)	\$ -	\$ -	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200
Staff Travel/Parking	\$ 102	\$ -	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
LLLT Education	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Postage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Licensing Forms	\$ -	\$ 4	\$ 5	\$ 5	\$ 7	\$ 8	\$ 10	\$ 13	\$ 16	\$ 18	\$ 21
TOTAL DIRECT COSTS	\$ 15,638	\$ 8,741	\$ 11,005	\$ 11,041	\$ 11,080	\$ 12,119	\$ 12,161	\$ 12,204	\$ 12,248	\$ 12,294	\$ 12,342
NET DIRECT INCOME/LOSS	\$ 6,800	\$ 24,215	\$ 20,433	\$ 13,289	\$ 28,506	\$ 44,147	\$ 58,421	\$ 72,523	\$ 91,818	\$ 118,020	\$ 150,019
INDIRECT COSTS	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027	FY 2028	FY 2029	FY 2030
Salary and benefits	\$ 136,939.00	\$ 88,451.00	\$ 85,785.61	\$ 88,359.18	\$ 91,009.95	\$ 46,870.13	\$ 48,276.23	\$ 49,724.52	\$ 51,216.25	\$ 52,752.74	\$ 54,335.32
Other indirects	\$ 38,688.00	\$ 23,232.00	\$ 30,629.92	\$ 31,548.82	\$ 32,495.29	\$ 16,735.07	\$ 17,237.13	\$ 17,754.24	\$ 18,286.87	\$ 18,835.47	\$ 19,400.54
TOTAL INDIRECT COSTS	\$ 175,627.00	\$ 111,743.00	\$ 116,415.53	\$ 119,908.00	\$ 123,505.24	\$ 63,605.20	\$ 65,513.36	\$ 67,478.76	\$ 69,503.12	\$ 71,588.21	\$ 73,735.86
NET INCOME/LOSS (all revenue and direct and indirect costs as currently calculated)	\$ (168,827.00)	\$ (87,528.19)	\$ (95,982.40)	\$ (106,619.15)	\$ (94,998.90)	\$ (19,458.50)	\$ (7,092.48)	\$ 5,044.17	\$ 22,314.81	\$ 46,432.18	\$ 76,282.80
Salaries and Benefits Base	\$ 102,193.28	\$ 83,287.00	\$ 85,785.61	\$ 88,359.18	\$ 91,009.95	\$ 93,740.25	\$ 96,552.46	\$ 99,449.03	\$ 102,432.50	\$ 105,505.48	\$ 108,670.64
FTE's	1.34	1	1.00	1.00	1.00	0.50	0.50	0.50	0.50	0.50	0.50
Overhead Base	\$ 28,871.64	\$ 29,737.79	\$ 30,629.92	\$ 31,548.82	\$ 32,495.29	\$ 33,470.15	\$ 34,474.25	\$ 35,508.48	\$ 36,573.73	\$ 37,670.94	\$ 38,801.07

Continue Licensing in Family Law

PROJECTIONS										
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
# LLLTs	76	99	108	130	164	206	257	311	369	429
	50%	29%	9%	21%	26%	26%	25%	21%	19%	16%
# Examinees	57	50	20	50	75	95	115	120	130	135
	235%	-12%	-60%	150%	50%	27%	21%	4%	8%	4%

Licensing Fee	\$ 229	\$ 234	\$ 238	\$ 238	\$ 245	\$ 253	\$ 263	\$ 273	\$ 287	\$ 301
% Increase	0%	2%	2%	3%	3%	3%	4%	4%	5%	5%

Exam Application Fee

FL + PR	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300	\$300
PR only	\$80	\$80	\$80	\$80	\$80	\$80	\$80	\$80	\$80	\$80
FL only	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250

Assumptions

1. 3% annual increase in LLLT Board expenses
2. 47% Exam Passage Rate thru 2024, 50% in 2025, 53% in 2026, 55% in 2027, 58% in 2028, 60% in 2029, & 63% in 2030 with development of training materials
3. Salaries & Benefits Base and Overhead Base includes 3% annual increase

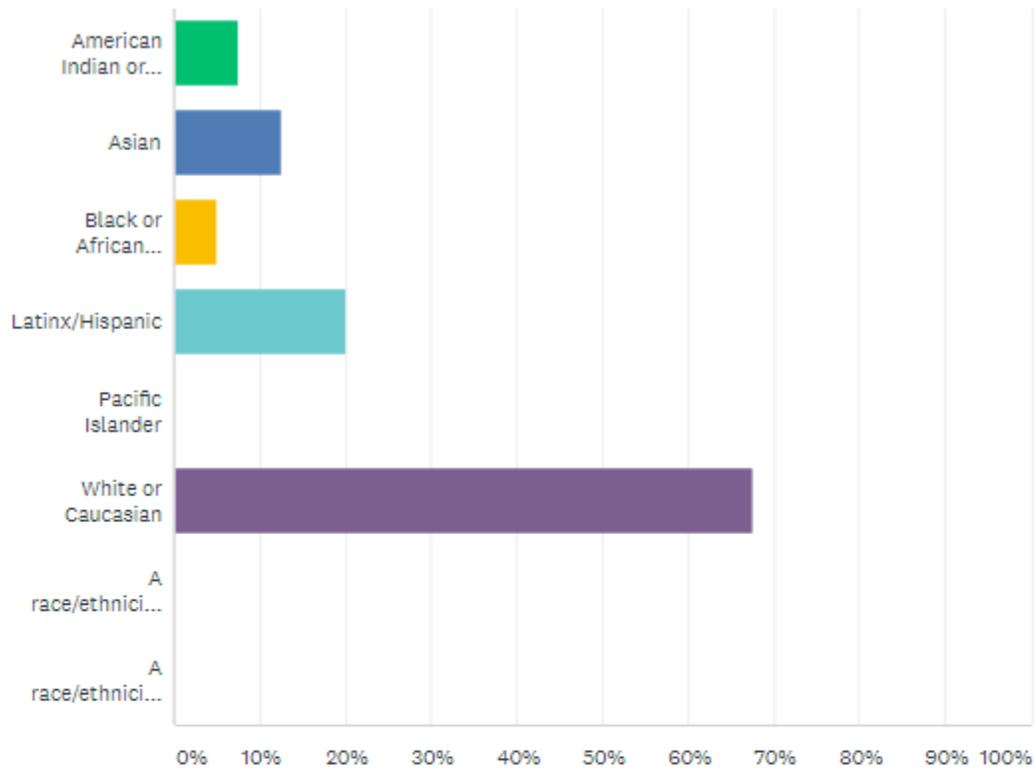
LLLT Practice Area Course Demographic Survey

Q1



Race/ethnicity (check all that apply)

Answered: 40 Skipped: 0



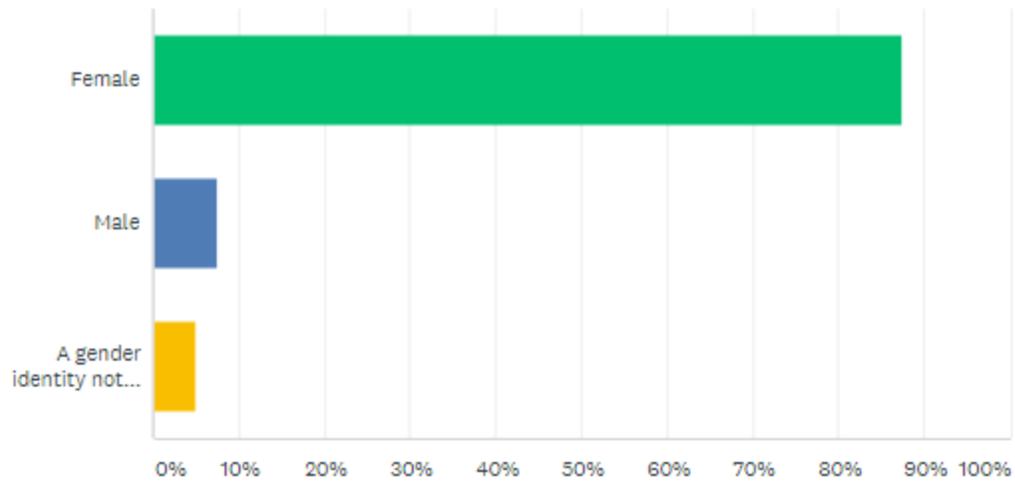
ANSWER CHOICES	RESPONSES	
American Indian or Alaska Native	7.50%	3
Asian	12.50%	5
Black or African American	5.00%	2
Latinx/Hispanic	20.00%	8
Pacific Islander	0.00%	0
White or Caucasian	67.50%	27
A race/ethnicity not listed	0.00%	0
A race/ethnicity not listed	Responses 0.00%	0
Total Respondents: 40		

Q2



Gender identity

Answered: 40 Skipped: 0



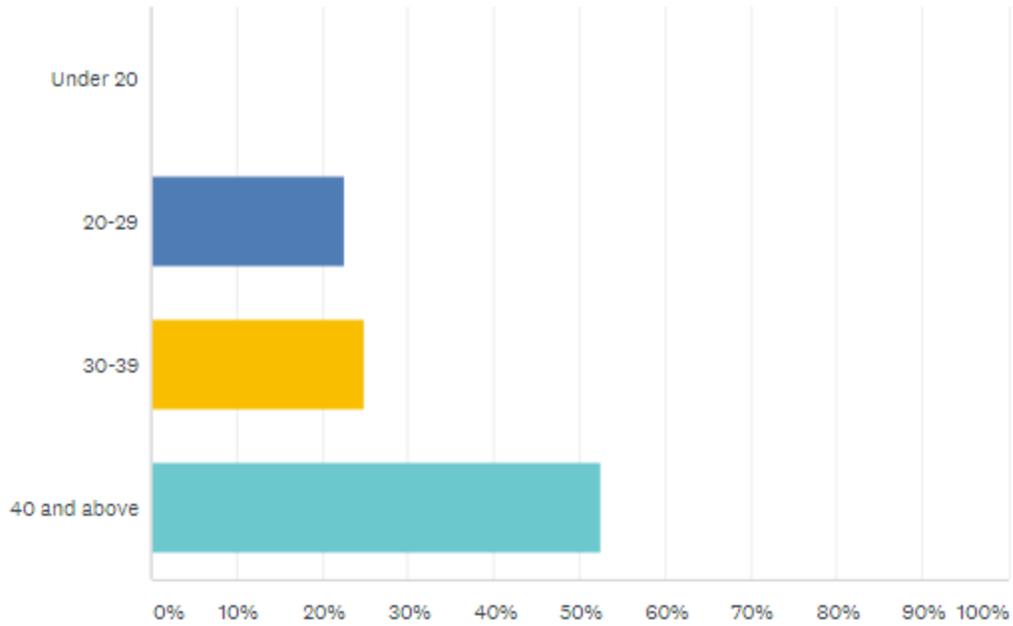
ANSWER CHOICES	RESPONSES	
Female	87.50%	35
Male	7.50%	3
A gender identity not listed	5.00%	2
Total Respondents: 40		

Q3



Age range

Answered: 40 Skipped: 0



ANSWER CHOICES	RESPONSES	
Under 20	0.00%	0
20-29	22.50%	9
30-39	25.00%	10
40 and above	52.50%	21
TOTAL		40