

Advisory Committee Meeting Record

CHAIRPERSON: Cheryl Jones		
MEETING DATE: 18 November 2022	MEETING TIME: 12 PM	MEETING PLACE: Zoom
RECORDER: Cheryl Jones		PREVIOUS MEETING: 10 November 2022 (Workshop)

MEMBERS: (P=PRESENT) Add nonmembers present to bottom of table with heading "Others Present" (OP)

(P/OP?)	Name and Title (List all members) Email Address and Ph #	Business Affiliation	Name and Title
	Paul Motz, Attorney at Law paulmotz@gmail.com	Paul Motz, Attorney at Law	Paul Motz, Attorney at Law Judge Elect
	Cheyenne Minick, JD, Attorney Cheyenne@Centexlawyers.net	Harris Law Office	Cheyenne Minick, JD, Attorney
P	Amanda Mahlstedt, Office Manager / Sr. Paralegal Amanda@SilverblattLaw.com	Silverblatt Law Office	Amanda Mahlstedt, Office Manager / Sr. Paralegal
P	Heather Farran, Paralegal Help@SilverblattLaw.com		Heather Farran, Paralegal
	Joshua Tisdale, Attorney at Law joshua@thetisdalelawfirm.com	Tisdale Law Firm, LLC	Joshua Tisdale, Attorney at Law
	Lisa Griffin, Chief Operating Officer LGriffin@carlsonattorneys.com	Carlson Law Firm	Lisa Griffin, Chief Operating Officer
P	Elizabeth Hubbard, Paralegal lizh@hillcountrylegal.com Tyler Rockafellow, Attorney at Law tyler@hillcountrylegal.com	Law office of Henson and Rockafellow	Elizabeth Hubbard, Paralegal Tyler Rockafellow, Attorney at Law
P	LaShell Bartholow, Senior Paralegal LaShell@txconstructionlaw.com		LaShell Bartholow, Senior Paralegal
OP	Keisha Holman	CTC Career Center Services	Keisha Holman, Director
OP	Gene Silverblatt, Attorney at Law	Silverblatt Law Office; CTC Paralegal Program	Gene Silverblatt, Attorney at Law

AGENDA

Agenda Item	Action, Discussion, Information	Responsibility
Approve Minutes from Last Meeting	Approved	Dr. Silverblatt
Old Business:	None	
New Business:	See Advisory Committee Required Functions below	Dr. Silverblatt
Curriculum Decisions:	Approved course development	Dr. Silverblatt
Other:		

MINUTES

Key Discussion Points	Discussion
Old Business:	<p>Reviewed the goals and objectives of the program curriculum</p> <p>Reviewed workplace competencies for the program occupations</p> <p>Reviewed the adequacy of existing college facilities and equipment</p> <p>Reviewed local business/industry leaders who will provide students with external learning experiences, employment, and placement opportunities</p> <p>Discussed promoting and publicizing the program to the community and to business and industry</p> <p>Discussed the needs of students from special populations</p>
New Business:	<p>Reviewed the most current enrollment and graduation numbers and trends.</p> <p>Considered program revisions as noted below.</p>
Curriculum Decisions:	<p>Approved development of special topic course: Remote and Virtual Law Practice.</p> <p>This was primarily done by workshop ahead of time. Here are the most relevant discussions:</p> <p><i>LaShell Bartholow, Paralegal:</i> It's great to hear that enrollments are on the rise! My response is based on my position as a senior civil litigation paralegal and e-discovery manager for Sanderford & Carroll PC in Belton, Texas.</p> <p>1. Since COVID, our firm now offers employees the ability to work from home. I say "ability" because our positions are not remote. Staff generally works from home when possibly contagious with illness or family emergencies. We have hired three support staff for our San Antonio office, and we did not offer a full-time remote position. I don't believe our firm will seek full-time remote paralegals. Due to the nature of construction litigation, we will always need support staff physically in the office. At least in our</p>

Belton office, I don't see offering a hybrid position, either. It becomes complicated. Does the firm offer the expensive equipment? Does the firm reimburse for use of personal equipment and supplies? Does the firm pay a stipend for phone usage? For those reasons, I don't see offering a fully remote position soon.

2. In addition to the regular duties of a paralegal, an increased knowledge of technology is needed. With the increased use of ZOOM and other video conferencing, there must be a more-than-average understanding of computer hardware, software, and equipment. In my firm, I assist with setting up our conference video equipment, scheduling ZOOM meetings, helping people set up computers, and troubleshooting computer issues. We do have offsite-IT, but generally, it helps to have someone with that knowledge to troubleshoot small-scale issues. A remote paralegal should be prepared and able to quickly get themselves up and running when they run into issues.

3. I do agree that any education geared toward the current market is beneficial. With the increase of the reliance on technology, preparing new paralegals regarding expectations should be considered. Cybersecurity, e-discovery, online etiquette, online grammar, and social media responsibility are areas that did not need addressing 14 years ago when I was in the program. Preparedness for a civil litigation paralegal includes a grasp that everything done on a computer can be found or monitored.

Amanda Mahlstedt, Paralegal and Office Manager: My responses are based on working as the senior paralegal and office manager in a mostly transactional law firm.

1. What remote and virtual aspects of your office are you currently employing or looking to employ in the near future?

Currently, we utilize Zoom for client meetings when we have a client who lives out of the local area, as well as some hearings are still being done virtually. We also utilize a case management software that allows us to upload necessary questionnaires, intakes, etc., that our clients can complete and sign digitally. For documents that require a notary, we upload the document to the client portal, then the client can have the document notarized by a digital notary, then save the new document and upload it to their client where I can then e-file the document as needed. We have already significantly cut down on the amount of paper we use. As with LaShell, I have the ability and option to work from home and usually do so when my kiddo is sick, or when I didn't get everything completed during our office hours and I take work home with me. We have been tossing around the idea of becoming a hybrid office for a few months now. Our issue is the lynchpin with the current legislature not allowing for virtual document executions for Wills - until that is changed, there is really no way for us to be completely virtual.

We have tossed around the idea of moving to a smaller office space and being a hybrid law firm that would look something like this:

All meetings, to include initial consultations, would be held

virtually. We would only come to the office for Will/Trust executions or if we have a client that does not have the requisite technical skills to operate Zoom or an electronic case management system (we tend to deal primarily with the elderly, so this does come up periodically). We would have a full-time in-person receptionist to answer the phone, assist with the technical side of Zoom conferences, and for clients who must drop off physical documents, again for those who can't and won't use the technology. Again, this is just an idea that we've been tossing around, but we do think that it is a definite possibility in the next couple of years.

2. Are there any unique skill sets or familiarization that may be required of employees?

I agree with LaShell's points about this topic. There are times when we have to assist clients over the phone when they are having issues with Zoom or the client portal. We also have off-site IT that we utilize; however, it's a last resort if I, or another employee, can't fix the issue. A remote/virtual employee will need to be able to resolve computer issues quickly, so familiarity with computer hardware and various software is an absolute must. For our law firm, we currently use MyCase, WordPerfect (I know...we're a rarity), Adobe Pro, and Zoom as the primary software. Since WordPerfect is not a common word processing software in the legal field, I will send new employees links to various training videos, so that can try to get familiar with it.

I also think that a virtual/remote employee should excel at time-management, communication (especially written), and self-motivation.

3. Do you agree that we should pivot some of our training towards this market change?

I agree that the training should pivot to this market change. In my paralegal forum, I often see hybrid or truly remote employment positions available, so gearing training for that type of employment position will give CTC students an upper hand in the job market.

Gene Silverblatt, Attorney: Thanks to LaShell and Amanda for your thoughtful responses. I guess what I am thinking is that whether law firms go completely or only partially virtual, the need for additional knowledge and skill sets for the staff might be called for. As I mentioned, my small firm has leveraged on-line secured communications, document sharing, billing, payments, and court hearings. I am also considering what to do with the "technology challenged" - such as having a "concierge service" for those who need more of the traditional "hand holding." As for staff, I would anticipate they will need to understand the hardware issues (such as video and sound equipment), software (such as Zoom, efile, cloud storage, meta type interaction, artificial intelligence interaction, on-line payment systems) and social interactions when working remotely. An understanding of on-line marketing would also be helpful.

Maybe I am out on an unsupported tree limb with this, and if so, and need to be called back down. That is the role of the Paralegal Program Advisory Board.

Elizabeth Hubbard, Paralegal: I would agree with you on the need to add a new set of skills, especially technology and virtual training. I am now working from home and there are many things that have made the transition run smoothly. One of those is the use of an app for phone calls. This app has made it where I can call clients and it looks like I am calling from the office, a client can call the office for me and the call gets transferred to my cell, I also still am able to answer overflow calls and transfer them throughout the office. The use of MyCase, eFiling, Westlaw, and Zoom meetings have made being almost 4 hours away from the office a lot easier than I expected it to be. Just simply using Facetime to show someone where to look to find a document or create a document is a huge help and I am sure there are other things that I do not even know about yet. As a "technologically challenged" person, I think it would be great to have a class that is geared in this direction.

Heather Farran, Junior Paralegal: "I just graduated from the program in August and am a junior paralegal in a small estate planning firm. In these few short months, I have seen a major transition between traditional and virtual client management. We have recently transitioned our intake process to a virtual platform. We use MyCase to exchange documents, messages, and billing information. We also offer some conferences via ZOOM.

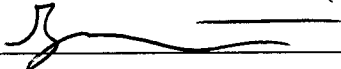
Familiarization with technology will be essential. Experience with case management systems and communication applications would prepare a future paralegal for success. The Law Office Technology class already offers some experience with case management software. I would dedicate more time in the Virtual Law Office class to build on those skills. This would be beneficial to both traditional and virtual paralegals.

I think communication is an important component of the virtual law office. Some clients will find this transition to be impersonal. The paralegal will have to compensate for this.

I do agree that we should pivot towards this change in market. As the market changes, so will our clients' expectations. I frequently encounter clients that would prefer to manage their matter virtually. Many of our MyCase clients prefer communication through the portal and personally I have found managing matters virtually to be more effective. Communication is quick and clear. I spend less time on follow up calls and revisions. Clients are also more attentive to requests for documents and information.

Other:

CHAIRPERSON SIGNATURE (or designee):



DATE:
11/29/2022

NEXT MEETING:
4/14/2023

Advisory Committee Required Functions

GIPWE Required Functions	How/when did the Committee address this function? At this meeting or a prior meeting? Please add to "ACTION ITEMS" below if necessary to show that this function is or will be addressed.
Evaluating the goals and objectives of the program curriculum	Reviewed survey taken of board representatives of the service area and analyzed at committee workshop. No issues.
Establishing workplace competencies for the program occupation(s)	Reviewed prior survey taken of board representatives of the service area and analyzed at committee workshop
Suggesting program revisions as needed	Open discussion at board meeting. See above.
Evaluating the adequacy of existing college facilities and equipment	Open discussion at board meeting. No issues.
Advising college personnel on the selection and acquisition of new equipment	Open discussion at board meeting. No issues.
Identifying local business/industry leaders who will provide students with external learning experiences, employment, and placement opportunities	Survey taken of board representatives of the service area and analyzed at committee workshop
Assisting in promoting and publicizing the program to the community and to business and industry	Open discussion at board meeting. No issues.
Representing the needs of students from special populations	Open discussion at board meeting. No issues.

Action Items

Description	Assigned To	Progress	Completion Date
Course development of special topic on remote and virtual law firms.	Dr. Gene Silverblatt and Mrs. Cheryl Jones	On-going	April 14, 2023