



# The State Bar of California

## CALIFORNIA PARAPROFESSIONAL PROGRAM WORKING GROUP

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Date: June 25, 2021

To: California Paraprofessional Program Working Group

From: Linda Katz, and Leah Wilson

Subject: Results of Survey Regarding Licensee Name

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### EXECUTIVE SUMMARY

The California Paraprofessional Program Working Group (CPPWG) is charged with developing recommendations for consideration by the Board of Trustees for the creation of a paraprofessional licensure/certification program to increase access to legal services in California. The CPPWG's charter is informed by the [California Justice Gap Study](#) and the [Task Force on Access Through Innovation of Legal Services](#). In carrying out its charge, the CPPWG must balance the dual goals of ensuring public protection and increasing access to legal services. The CPPWG's recommendations to the Board will include a recommended name for licensees.

### BACKGROUND

CPPWG Chair Justice Petrou and Ms. Leah Wilson met with a principal from Catchword Branding, an expert in brand development and selection of names for services. After a brainstorming session during which the purpose of the program was discussed, the firm provided a list of names for consideration, as well as follow-up questions for consideration. Two surveys were developed to solicit opinions from the members of the Working Group and associated staff.

### DISCUSSION

#### Initial Survey

On April 21, 2021, a survey was sent via Qualtrics to all 19 members of the CPPWG and 15 members of State Bar and Supreme Court staff who support the Working Group. A total of 20 individuals completed the survey, including 16 CPPWG members, 3 staff, and 1 unidentified respondent. The following pages provide a summary of the questions and responses.

**Question 1.** Please rank your top five choices from the following list:

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- |                      |  |                                    |                                      |
|----------------------|--|------------------------------------|--------------------------------------|
| • Law Advisor        | • Legal Professional                   | • Independent Legal Rep (ILR)      | • Certified Legal Advisor (CLA)      |
| • Law Consultant     | • Legal Rep                            | • Certified Law Advisor (CLA)      | • Certified Legal Consultant         |
| • Law Coordinator    | • Independent Legal Advisor (ILA)      | • Certified Law Consultant (CLC)   | • Certified Legal Coordinator (CLC)  |
| • Law Practitioner   | • Independent Legal Consultant (ILC)   | • Certified Law Coordinator (CLC)  | • Certified Legal Practitioner (CLP) |
| • Law Professional   | • Independent Legal Coordinator (ILC)  | • Certified Law Practitioner (CLP) | • Certified Legal Professional       |
| • Law Rep            | • Independent Legal Practitioner (ILP) | • Certified Law Professional (CLP) | • Certified Legal Rep (CLR)          |
| • LawPro             | • Independent Legal Professional       | • Certified Law Rep (CLR)          |                                      |
| • LawTech            |  |                                    |                                      |
| • Legal Advisor      |  |                                    |                                      |
| • Legal Consultant   |  |                                    |                                      |
| • Legal Coordinator  |  |                                    |                                      |
| • Legal Practitioner |  |                                    |                                      |

### *Most overall votes from members:*

1. 7 votes:
  - Certified Legal Advisor
2. 5 votes:
  - Certified Legal Consultant
  - Certified Legal Practitioner
  - Certified Law Practitioner
  - Certified Legal Professional
3. 4 votes:
  - Certified Law Advisor

### *Most votes in top 3 ranking from members:*

1. 5 votes:
  - Certified Legal Advisor
  - Certified Legal Consultant
2. 4 votes:
  - Certified Legal Practitioner
3. 3 votes:
  - Certified Law Advisor

**Question 2.** Please provide your idea(s) for license names not included on the list above.

**Responses:**

[Bracketed names indicate respondent's selections]

- Use the word "licensed" instead of "certified" for the choices I made above. [Certified Legal Advisor, Certified Legal Consultant, Certified Legal Practitioner, Certified Legal Rep]
- Certified/licensed non attorney legal rep/consultant/advisor/practitioner
- I liked the term paraprofessional actually
- Licensed Law Practitioner, Licensed Law Professional, Licensed Law Consultant, Licensed Law Advisor
- Licensed Legal Practitioner, Licensed Legal Professional
- Limited License Legal Technician (LLLT) - my most preferred. Certified Limited Legal Practitioner (CLLP) Legal Paraprofessional
- Paralegal Practitioner; Paralegal Advocate; Legal Assistant Practitioner
- Professional Legal Assistant (PLA)

**Question 3.** Why do you like the names that you selected? What characteristics or message do they convey?

**Responses:**

[Bracketed names indicate respondent's selections]

- 1-3 use the term "certified" which alerts users that there is some process of certification that has taken place and gives the practitioner the imprimatur of legitimacy. [Certified Legal Practitioner; Certified Legal Professional; Certified Legal Consultant]
- I am very concerned that consumers will be misled by the name of the program. It must avoid misleading consumers into believing the licensee is an attorney. "Paralegal Practitioner" or "Paralegal Advocate" is easier to understand and descriptive than the names on the list. [Certified Law Practitioner; Certified Legal Practitioner; Legal Practitioner]
- I like having certified in the name b/c it signals that the person had to complete some minimum qualifications and are being regulated. [Certified Law Professional; Certified Legal Consultant; Certified Legal Practitioner]
- I think it is important to include the term certified, much like we do with certified law students who are permitted to appear in court. I like the name that includes the idea of representation, but I don't like the abbreviation of rep which is why I did not rank it higher. I think "rep" also has alternate meanings and while long, I think representative might be worth the long name as it really captures what I think we are contemplating [Certified Law Professional; Certified Legal Consultant; Certified Legal Practitioner]
- I want names not to be confused with lawyer. [Certified Legal Consultant; Independent Legal Rep; Certified Law Coordinator]
- I want the title to not be confused with an attorney or paralegal. I want to communicate that their authority is limited. I want it to be understood that they will need a license or

some proof of being able to be engaged in this work. I want it to sound very different from attorney and paralegal. [Limited License Legal Technician (LLLT) - my most preferred. Certified Limited Legal Practitioner (CLLP) Legal Paraprofessional]

- In my opinion, these names communicate the job description more accurately than others. I believe that inserting the words “non attorney” in the title is even better as it clearly communicates to the consumer that this person is not an attorney. [Use the word “licensed” instead of “certified” in these names: Certified Legal Advisor, Certified Legal Consultant, Certified Legal Practitioner, Certified Legal Rep]
- Makes it clear the person is an independent legal advisor but not a lawyer or paralegal [Certified Legal Advisor, Certified Legal Professional, Independent Legal Consultant, Independent Legal Practitioner, Independent Legal Professional]
- The fact that this person is LICENSED. “Licensed” is more accurate than “certified.” [Licensed Legal Practitioner, Licensed Legal Professional]
- Though I prefer short names, I think it's important here to include “licensed” or “certified” to lend more credibility to these people, and to distinguish them from unlicensed people who call themselves law advisors, etc. AND, “licensed” is better than “certified,” because that's what they will be, licensed. ALSO, “law” rather than “legal” because people might think “legal” simply means not illegal, and I think that confusion will be worse in Spanish translation of the terms. ALSO not “rep” because some of them might be licensed to advise and assist, but not represent. [Licensed Law Practitioner, Licensed Law Professional, Licensed Law Consultant, Licensed Law Advisor]

**Question 4.** Are there any choices that you strongly dislike? Why not? What characteristics or message do they convey?

**Responses:**

- All of the proposed names using the words "Law" or "Legal" are likely to be misleading and convey that the licensee is an attorney. The names that use "practitioner" are better
- Anything resembling lawyer or attorney
- Do not like the ones that begin with 'law' - sound awkward
- Everything that states Legal Advisor/Counsel/Practitioner or Law Advisor/Counsel/Practitioner I most dislike. I think it is too close to sounding like an attorney and therefore confusing. I believe starting the title with limited or certified is helpful to the consumer.
- I did not like any of the choices with independent b/c it is unclear if there is any affiliation to a regulatory body.
- I do not think a name that includes the word “independent” is accurate. The court is independent. The licensed paraprofessional is supposed to be representing the client, advancing that client’s case, etc. That person is not really independent so that seems like a complete misnomer to me.
- I don’t like “independent” as it could create confusion for those working in law firms.

- I don't like the use of the word "certified" --- these people will be LICENSED by the State Bar of California and their title ought to convey that.
- I strongly dislike all of the choices that use "law" and "independent" in the title. I think these titles minimize the assistance that the paraprofessional can provide to clients both in and out of the courtroom.
- Law Rep, Law Pro and Law Tech are nice and short, but don't sound very professional, very respectable. Sound like an advertisement.
- The ones with the word "law" sound awkward. "Independent" communicates nothing of value to the consumers but "certified" and "licensed" indicate that the person went through a special process to be able to do this work. "Coordinator" and "professional" do not accurately describe the job.

**Question 5.** Do you have any strong preferences, in terms of style?

- One-word name
- Two-word name
- Newly coined name
- Easy-to-remember acronym
- Other

**Multiple choice responses:**

1. Easy-to-remember acronym (30 votes)
2. Newly coined name (16 votes)
3. Two-word name (15 votes)

**Other responses:**

- Include the word "Licensed" because that's what they will be, and communicates that they have officially recognized status. "Certified" isn't quite the same, could mean just an endorsement or evaluation.
- No preference as long as the word certified is included to help people distinguish from notarios and other pretenders -- I think this will be a VERY important aspect of the name. Maybe it should be Certified Representative (CR) since the term law or legal may be redundant? Or Certified Legal Representative (CLR)
- Non-misleading is the most important factor
- The word "licensed" ought to be in the title. Also, the word "independent" could be in there to convey the fact that these people do not need lawyer supervision.

**Question 6.** Are there words or concepts that should be further explored?

**Responses:**

- How these phrases translate into Spanish and other languages commonly spoken in California to avoid confusion

- Include the word “Licensed” because that's what they will be, and communicates that they have officially recognized status. “Certified” isn't quite the same, could mean just an endorsement or evaluation.
- Limited; Licensed; Paraprofessional; Certified Limited Legal Paraprofessional (CLLP) or Technician (CLLT)
- Name should identify paraprofessionals without much explanation.
- Practitioner or advocate
- The use of the full word “representative”

**Question 7.** Are there words or concepts that should be avoided?

**Responses:**

- Coordinator
- Law or Legal
- Lawyer or anything that translates to abogado in Spanish
- Legal Advisor; Legal Counsel
- Not rep or representative, because some might be licensed only to advise and assist, but not represent.
- The use of the word “Independent”

**Follow-up Survey**

The results of the initial survey were shared with Catchword Branding, which assisted in the development of a follow-up survey. Based on that review and discussion, which included an assessment of both quantitative votes and comments received, as well as an analysis of the acronym (or initialism) that a particular name would generate, a list of eight potential names was included in the follow-up survey. Respondents were asked to rank their top three choices from the following list:

- Certified Legal Advisor (CLA)
- Certified Legal Consultant (CLC)
- Certified Legal Practitioner (CLP)
- Licensed Legal Advisor (LLA)
- Limited License Legal Consultant (LLLC)
- Limited License Legal Practitioner (LLLP)
- Licensed Paraprofessional Legal Consultant (LPLC)
- Paraprofessional Legal Consultant (PLC)

The survey was sent to all 19 members of the CPPWG on June 10; a reminder was sent on June 16 to those who did not complete the survey. Following is a summary of the votes, which were received from 14 members of the working group:

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### *Most overall votes:*

1. 8 votes:
  - Limited License Legal Practitioner (LLLP)
2. 7 votes:
  - Certified Legal Practitioner (CLP)
3. 6 votes:
  - Licensed Legal Advisor (LLA)
4. 5 votes:
  - Licensed Paraprofessional Legal Consultant (LPLC)

### *Most first place votes:*

1. 6 votes:
  - Limited License Legal Practitioner (LLLP)
2. 3 votes:
  - Licensed Legal Advisor (LLA)
3. 2 votes:
  - Certified Legal Advisor (LLA)

The results of both the April 21 and June 10 surveys will inform a discussion of naming options at the June 25 CPPWG meeting.