



The State Bar of California

EXCERPTED FROM THE
FINAL REPORT AND RECOMMENDATIONS
CALIFORNIA PARAPROFESSIONAL PROGRAM WORKING GROUP
SEPTEMBER 21, 2021

Regulatory Requirements

Requirement	Recommendations
Financial Responsibility	<ul style="list-style-type: none">• \$100,00 Security Bond• Client Security Fund (CSF)
Minimum Continuing Legal Education <i>No more than 18 hours may be obtained through self-study</i>	36 hours every 3 years, as follows: <ul style="list-style-type: none">• 28 hours in the paraprofessional's practice areas• 4 hours on legal ethics• 1 hour on competence issues• 1 hour on recognition and eliminations of bias in the legal professional and society, including disability-related biases• 1 hour of trauma-informed practice• 1 hour of practice management/running a business
Rules of Professional Conduct	Proposed Rules, based on the Rules of Professional Conduct (RPC) for attorneys, are provided as Appendix A.
Supportive Measures (Proactive Regulation)	<ul style="list-style-type: none">• Continuing Legal Education (CLE) programs and toolkits to support paraprofessional practice<ul style="list-style-type: none">○ Sample client surveys○ Voluntary, interactive self-assessment• Ethic hotline• Online resources, including<ul style="list-style-type: none">○ a disclosure form addressing the requirements of Rule 1.4.2 (a)(2), available at no cost on the State Bar website.○ A non-exhaustive referral list of free legal service providers and modest means panels available from legal aid programs and nonprofit organizations with contact information, but county and practice area.
Annual Reporting Requirements	<ul style="list-style-type: none">• Fees charges to clients• Suggestions for additional training and resources to support competent legal services