

**Guidelines for the Utilization of Paralegals
for Submission to the Colorado Bar Association
Board of Governors
on May 17, 2008**

Preamble

The Paralegal Committee of the Colorado Bar Association drafted and the Colorado Supreme Court Office of Attorney Regulation Counsel has reviewed, the Guidelines for the Utilization of Paralegals. Most states have also prepared or adopted state-specific recommendations or guidelines for the utilization of services provided by paralegals.¹ This is the second revision of the original Guidelines approved by the CBA Board of Governors in 1986. All of these Guidelines are intended to provide paralegals and lawyers with useful and authoritative guidance with respect to the appropriate use of paralegals.

This revision of the Paralegal Guidelines includes expanded and new guidelines with a special emphasis on the changes in technology that have taken place since the first draft in 1989 and may assist paralegals, lawyers, and law firm administrators in revising or further refining their own recommendations and guidelines. New practice areas include Bankruptcy (Creditor's Counsel and Trustee's Counsel), Juvenile, Labor and Employment (expanded from Employment), Natural Resources and Energy (expanded from Natural Resources), and Social Security/Disability. One practice area was eliminated: Commercial (already covered in other practice areas). Moreover, the Colorado Bar Association Paralegal Committee is of the view that these guidelines on paralegal services will encourage lawyers to utilize those services effectively and promote the continued growth of the paralegal profession.

Successful law firms know that using qualified paralegals helps them deliver better service and more value while increasing their profits. Now more than ever, the paralegal is a necessary component in the successful and profitable delivery of legal services. Paralegals help improve client service, lower client costs and improve a law firm/corporation's bottom line. These guidelines are intended to provide assistance in effectively integrating paralegals into practice and expand their roles to ensure continued utilization of paralegals and growth of the profession.

The proposed Guidelines for the Utilization of Paralegals may be viewed in their entirety on the Colorado Bar Association website at:

<http://www.cobar.org/index.cfm/ID/106/CLAS/Guidelines-for-the-Utilization-of-Paralegals/>

¹ In 1986, the ABA Board of Governors approved a definition for the term "legal assistant." In 1997, the ABA amended the definition of legal assistant by adopting the following language: "A legal assistant or paralegal is a person qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity who performs specifically delegated substantive legal work for which a lawyer is responsible." To eliminate any confusion over the term "legal assistant" since it is used in Colorado for positions other than that of a paralegal, for example, legal secretary, these guidelines use the term "paralegal" rather than "legal assistant," however, the terms legal assistant and paralegals are often used interchangeably.