UNBUNDLED LEGAL SERVICES: Past, Present and Future
1988 FTC INVESTIGATION of “Unbundled” Real Estate Brokers
UNBUNDLING’S ORIGIN AND PROMOTION

ABA Standing Committee on Delivery Of Legal Services (1992)
CONFERENCE PRESENTATIONS
LIMITED SCOPE REPRESENTATION:

A NEW WAY OF THINKING ABOUT ACCESSIBLE LEGAL SERVICES

By Eileen Pruett and Bert Tiger Whitehead*
Trial Court of Massachusetts

Limited Assistance Representation Training Manual
Welcome to UnbundledLaw.org

The best and most complete collection of online resources for limited scope representation is the Unbundling Resource Center maintained by the ABA’s Standing Committee on the Delivery of Legal Services. You will find fee agreements, articles, reports, forms, ethics opinions, best practices, and court rules organized by state, as well as a wealth of other materials.

A complete set of Risk Management Materials is available here for family law (click here) and civil (click here) limited scope practice. They are free for download and practitioners are encouraged to tailor them to your own individual practice. If used as directed, including close adherence to the best practices, you have to work hard to mess this up. Click here for FAQ

For a free limited scope three hour training courtesy of PLI (Practising Law Institute), click here. CLE credit is available for most states, including one hour of ethics.

Click here for our old website and information on the Baltimore Conference
ABA AND STATE BAR INITIATIVES

AMERICAN BAR ASSOCIATION
STANDING COMMITTEE ON THE DELIVERY OF LEGAL SERVICES
REPORT TO THE HOUSE OF DELEGATES

RESOLUTION

1. RESOLVED, That the American Bar Association urges courts and other governmental entities, bar associations, non-profit organizations and entrepreneurial entities that make forms for legal services available to individuals through the Internet to provide clear and conspicuous direction on how people can access a lawyer to provide assistance with their legal matters.
TOOLBOXES FOR LAWYERS

UNBUNDLING LEGAL SERVICES:
Options for CLIENTS, COURTS & COUNSEL
ETHICAL RULE CHANGES

ABA WHITE PAPER (2014)

Introduction

This white paper has been prepared by the American Bar Association’s Standing Committee on the Delivery of Legal Services. The purpose of the paper is to provide policy-makers with information and analysis on the ways in which various states are formulating or amending rules of professional conduct, rules of procedure and other rules and laws to enable lawyers to provide a limited scope of representation to clients who would otherwise proceed on a pro se basis, and to regulate that representation.
ENACTMENT OF MODEL RULES 1.2C AND 6.5 IN MOST STATES

Policies to enable lawyers to provide limited scope representation of civil litigants are being advanced through two concurrent initiatives. One is the result of Ethics 2000, the ABA endeavor to review and amend the ABA Model Rules of Professional Conduct, which began in 1997 and concluded with adopted revisions to the Model Rules in 2002. 14 States are in the process of reviewing the revised Model Rules, and adopting, adapting or rejecting the specific changes, including Model Rules 1.2(c) and 6.5.
OVERHAUL OF STATE POLICIES TOWARD UNBUNDLING

The second initiative involves individual state collaborative analyses of limited scope representation policies. Rather than focusing on the ethics rules as a whole, as Ethics 2000 did, these initiatives are statewide efforts that examine the dynamics of self-represented litigation. Many of these state initiatives stem from the 1999 National Conference on Pro Se Litigation, produced by the American Judicature Society.
5 AREAS IF POLICY CHANGE

The policy issues that have been addressed as a result of both of these initiatives thus far are:

- Defining the scope of representation;
- Clarifying communications between counsel and parties;
- Creating parameters for the lawyer’s role in document preparation, including disclosure of the lawyer’s assistance;
- Governing the entry of appearances and withdrawals for limited scope representation; and
- Excusing conflicts checks for limited services programs.

These reports express a common need to address the changes in the delivery of legal services, most often with rules that give a greater certainty to the process.
SUPPORT BY LEGAL MALPRACTICE INSURERS
Q&A: Sue Talia, National Limited Scope Representation Advocate

By Hello Divorce Team in Family Law | Posted September 21, 2017

Hello Divorce CEO Erin Levine recently had the privilege of speaking with M. Sue Talia, an early advocate for unbundled legal services. Her pioneering efforts helped make flat fee legal services a reality, in spite of significant pushback from big city Bar Associations. Activists like Ms. Talia made our
THE PRESENT

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GROWTH OF UNBUNDLING

LINK TO MAP:
https://www.americanbar.org/groups/delivery_legal_services/resources/pro_se_unbundling_resouce_center/pro_se_resources_by_state_map.html
Brian Burke, Santa Barbara, CA
http://burkefamilylaw.com/roadmap-consultation

Roadmap Consultation
At the beginning of divorce everyone wants to know:
Where am I?
Where do I want to go?
How do I get there?

“Answering these questions is what the “Roadmap Consultation” is designed to accomplish. In the words of clients:

“This was exactly what I was looking for...I came on a fact-finding mission. I got the information I needed and also a strategy... This is the first time I’ve paid for legal services and felt that I got more than I paid for...”

“Thank you so much for your help. In addition to providing me with a clear understanding of my legal position and approaches to dealing with the situation. You have helped me find my power and to be able to sit in a place of acceptance...”

“The combination of legal advice and legal counseling is unique; I truly appreciate your compassion.”

I explain the process to everyone who calls for an appointment to ensure that if we meet we are both there to do the same thing. Here’s what we talk about.
If you’ve made an appointment, you should have been asked for your preferences regarding the presence of a dog.
LIMITED SCOPE LEGAL SERVICES

Unbundled Legal Services is a method of addressing a client's legal needs based on a limited scope of our attorney involvement to specific tasks, specific methods, or certain issues. The client will be responsible for doing everything else. This method allows individuals to access (and pay for) a defined scope of the work. As part of this process, Gevurtz Menashe is proud to offer unbundled legal services for our clients. For more information, give us a call at 503-227-1515.

BENEFITS OF USING UNBUNDLED LEGAL SERVICES IN OREGON & WASHINGTON

In any legal dispute the stakes are high. It is possible to make mistakes that can be costly to repair. Individuals who try to handle the complexities of their own divorce, without the help of a lawyer, run the risk of overlooking factors that a lawyer or a judge would find

UNBUNDLED LEGAL SERVICES V. TRADITIONAL ATTORNEY REPRESENTATION

Traditional attorney representation in a divorce action, for example, includes communicating with the client, advising the client as to legal rights and responsibilities, preparing appropriate pleadings, engaging in adequate discovery, communicating with the opposing party for
Justice Café, Atlanta, GA
http://www.justicecafe.com/
Feeling stressed and overwhelmed about your separation? Don’t know where to start? We can help!

We provide information and answer your questions about property, children, support guidelines and how to minimize the impact of separation on your family. After the flat fee two-hour session, you will be able to identify next steps and decide how to move forward. Taking control of your separation process at the outset will save you time and money.

The Neutral Zone™

What We Do
At The Neutral Zone, we help you get started by providing information tailored to your individual and family situation. You will learn about financial issues related to property and support Considerations in developing age appropriate parenting plans. The impact of financial issues.

How We Do It
Early Neutral Information Meeting What you need to know to figure out what you need to do … During this 2 hour meeting, you and your partner will meet with experienced neutral family, financial and legal professionals who will provide ... Read More

Who Can Help
How can various professionals help you move forward after our information meeting? Financial Professionals Collect and understand the financial information and implications for the future Options for settling your property and sharing your income ... Read More

http://www.theneutralzone.info
Levitt and Quinn, Los Angeles, CA
http://levittquinn.org/services/

SERVICES

Levitt & Quinn Family Law Center offers a mix of free and low-cost legal services, depending on income and assets, and dependents in the home. Some applicants will qualify for free legal help. Fees, if any, are on a sliding scale based upon income, number of dependents in the household, expenses, and other factors. The Center charges $40 for an initial consultation. We ask clients to pay for legal services in advance.

Registration for intake and consultation is on a first-come, first-served basis and begins promptly at 8:30 a.m. every Thursday and Friday.

WHAT TO BRING TO YOUR CONSULTATION

These are the items and information that we need from you on your first visit:

- $40 consultation fee. We do not accept personal checks.
- Photo identification.
- Proof of income such as two recent pay stubs or tax returns.
- Proof of expenses (what you spend each month) and assets (what you own).
- Copies of ALL court papers, court orders, legal documents, and any other papers or written material related to your case.
- For divorce cases, bring your marriage certificate. If your case involves minor children, bring their birth certificates.
- A completed application for services (English Form | Forma Española)

MostenMediation.com

Forrest S. Mosten
Mediator and Collaborative Attorney

mosten@mostenmediation.com

310.473.7611
hello divorce.

Founded in 2017 | Oakland, CA
Unbundled Legal Services: California Divorce
www.hellodivorce.com
Divorce Navigator

Overview

Not sure where to begin? You're not alone. We aren't going to lie:
THE FUTURE OF UNBUNDLED LEGAL SERVICES
2027 UNBUNDLED LEGAL SERVICES WILL BE BASED OUR WORK IN 2017
UNBUNDLING IS MORE THAN IMPROVING LEGAL ACCESS......
UNBUNDLING IMPROVES THE LEGAL PROFESSION’S REPUTATION
UNBUNDLING IMPROVES PROFITABILITY AND QUALITY OF LIFE OF LAWYERS
UNBUNDLING WILL ACCELERATE THE GROWTH OF MEDIATION
UNBUNDLING CAN ENHANCE PEACE MAKING FOR FAMILIES
THE FOLLOWING FURTHER REFORMS WILL INCREASE UNBUNDLING’S IMPACT

<table>
<thead>
<tr>
<th>SFAC Recommendations Re: Unbundled Legal Services</th>
<th>OSCA Status Report</th>
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<tbody>
<tr>
<td>1. Enact unbundling-friendly court rules.</td>
<td>The unbundled legal services UTOR Work Group met four times to discuss changes to the UTORs that would facilitate limited scope representation. The Work Group membership included:</td>
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<td><strong>Unbundled Legal Services UTOR Work Group</strong></td>
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<tr>
<td></td>
<td>Judge Timothy Shockey, Jackson County Circuit Court</td>
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<td>Judge Anne Marie Siemens, Douglas County Circuit Court</td>
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<td>Judge Karla McIntyre, Lane County Circuit Court</td>
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<td></td>
<td>Joshua D. Rabich, Portland, OR</td>
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<td>Holly Rudolph, Forest Grove, OR</td>
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<td></td>
<td>Helen Henschke, General Counsel, Oregon State Bar</td>
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<td></td>
<td>Robin Setz, Support Unit Attorney, Oregon Law Center</td>
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<td></td>
<td>The Work Group discussed many facets of unbundled legal services including the ethics of providing limited scope representation, nationwide trends in limited scope representation, the role of the court in limited scope representation, and how to encourage practitioners to provide limited scope representation. The final proposal to the UTOR Committee adds language to UTOR Chapter II (Domestic Relations Proceedings) that provides either notice or notice and termination of limited scope representation when an attorney appears in court with a client and adds language clarifying service requirements; suggests that the UTOR Committee enact unbundling-friendly rules for other practice areas, and suggests that the UTOR review the necessity of the Certificate of Document Preparation (UTOR 1.00.017). The next meeting of the UTOR Committee is October 10, 2015.</td>
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<td>2. Develop and make available user-friendly court forms that facilitate barrister making and withdrawing from limited scope appearances.</td>
<td>The unbundled legal services UTOR Work Group created two forms:</td>
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<td>(1) Notice of Limited Scope Representation; and</td>
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<td></td>
<td>(2) Termination of Limited Scope Representation</td>
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<td></td>
<td>The new forms will be sent through the CED Law and Policy Work Group, and will be submitted with the UTOR revisions to the UTOR Committee for review.</td>
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LAWYERS WILL BE REQUIRED TO DISCUSS UNBUNDLING AS PART OF REQUIRED INFORMED CONSENT
STATES WILL PERMIT LAWYERS, TRAINED LEGAL TECHNICIANS, AND MEDIATORS TO DRAFT FINAL AGREEMENTS AND COURT DOCUMENTS

CONTRACT AGREEMENT

DV-Company Name Here

This Agreement is made on ____________________

BETWEEN

1. (The First Party Name Here)

2. (The Second Party Name Here)

RECIPIES

AGREEMENTS

1. Organization Information

2. Services to be performed

3.

4.
LAWYERS WILL BE REQUIRED TO HAVE UNBUNDLED TRAINING TO GET A LICENSE
LIMITED SCOPE DELIVERY OF LEGAL SERVICES WILL BE ONE OF THE MOST IMPORTANT SECTIONS WITHIN THE ABA
10 COACHING ROOMS FOR EVERY 1 TRIAL COURTROOM
JUDGES AND COURT STAFF WILL BE TRAINED IN LIMITED SCOPE DELIVERY
COURTS WILL SEND LETTERS TO PARTIES ABOUT UNBUNDLING

Using a family law attorney can be very important to you. If you cannot afford a deposit (retainer) and are prepared to do some of the legal work yourself, many private attorneys and non-profit organizations offer unbundled legal services, also called Limited Scope Representation. If you cannot afford an attorney at all and you need to do all of the work yourself to complete your case, you can get guidance and information about workshops and assistance available at self-help centers in courthouses by visiting the court’s website at www.lacourt.org and clicking on the Self-Help tab.
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INCENTIVES TO USE LIMITED SCOPE REPRESENTATION
VOLUNTEER ELDER DOCENTS WILL BE VOLUNTEER DOCENTS TO HELP SRL’S
THE FUTURE IS HERE!!

• MARIA

• LEVON

• SARAH