



Law Society
of Ontario

Barreau
de l'Ontario

How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

CHAIR

Robert Burd, Paralegal

Not Guilty Plea Professional Corporation

March 4, 2021





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Law Society of Ontario

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How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

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How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

CHAIR: **Robert Burd**, Paralegal, *Not Guilty Plea Professional Corporation*

March 4, 2021

9:00 a.m. to 12:00 p.m.

**Total CPD Hours = 2 h Substantive + 25 m Professionalism ^P
+ 35 m EDI Professionalism ^e**

**Webcast Only
Law Society of Ontario
Toronto, ON**

SKU CLE21-00304

Agenda

- 9:00 a.m. – 9:05 a.m.** **Welcome and Opening Remarks**
- Robert Burd, Paralegal
Not Guilty Plea Professional Corporation
- 9:05 a.m. – 10:00 a.m.** **The Changes Imposed by the Pandemic: What Worked and What Did Not (10 m ^P)**
- Moderator: Robert Burd, Paralegal, *Not Guilty Plea Professional Corporation*
- Panelists: Jennifer Ansell, Professor, Paralegal and Law Clerk Programs, *Humber College*
- Teresa Donnelly, Treasurer, *Law Society of Ontario*
- Shelina Lalji, Paralegal
Shelina Lalji Professional Corporation

John Tzanis, Paralegal
Continental Legal Services Professional Corporation

10:00 a.m. – 10:05 a.m. Question and Answer Session

10:05 a.m. – 10:20 a.m. Break

10:20 a.m. – 11:20 a.m. Visioning for the Future: A Panel Discussion (15 m )

Moderator: Robert Burd, Paralegal, *Not Guilty Plea Professional Corporation*

Panelists: The Honourable Sharon Nicklas, Associate Chief Justice
Coordinator of Justices of the Peace
Ontario Court of Justice

Jennifer Ansell, Professor, Paralegal and Law Clerk
Programs, *Humber College*

Teresa Donnelly, Treasurer, *Law Society of Ontario*

Jacqueline Horvat, *Spark LLP*

Shelina Lalji, Paralegal
Shelina Lalji Professional Corporation

11:20 a.m. – 11:55 a.m. Fostering Diversity: A Panel Discussion (35 m )

Moderator: Robert Burd, Paralegal, *Not Guilty Plea Professional Corporation*

Panelists: Teresa Donnelly, Treasurer, *Law Society of Ontario*

Shelina Lalji, Paralegal
Shelina Lalji Professional Corporation

Michael Radan, Paralegal, *Croft Radan LLP*

Leni Yang, Paralegal, *Justice by Case*

11:55 a.m. – 12:00 p.m. Question and Answer Session

12:00 p.m. Program Ends

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TAB 1

How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

The Changes Imposed by the Pandemic:
What Worked and What Did Not (PowerPoint)

John Tzanis, Paralegal

Continental Legal Services Professional Corporation

Resources Available to Practitioners Who are Struggling

Jennifer Ansell, Professor, Paralegal and Law Clerk Programs

Humber College

March 4, 2021





How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

March 4, 2021

THE CHANGES IMPOSED BY THE PANDEMIC: WHAT WORKED AND WHAT DID NOT

JOHN TZANIS

Technology

What worked?

Teleconferencing, Zoom and Teams when laptops/desktops were state of the art, bandwidth was high and no one else was in the room.

Colleagues on both sides were understanding, courteous, civil and worked well under difficult circumstances.

- WHAT DID NOT WORK
- POOR BANDWIDTH LED TO PROBLEMS UNDERSTANDING EACH OTHER DUE TO LAG. DISRUPTIONS DUE TO FAMILY MEMBERS BEING IN THE ROOM WERE NOT CONSISTENT WITH CONFIDENTIALITY AND SERIOUSNESS
- SOME COLLEAGUES USED THE PANDEMIC AS AN EXCUSE TO RESPOND VERY LATE, INFREQUENTLY OR NOT AT ALL

Changes in Client-Service Protocol

No personal meetings at office, lunch or social events.

*Couriers, fax, telephone and video conferencing only
Numerous matters on hold as closing of Small Claims Courts since March 2020 have essentially stopped all progress on matters, therefore invoices are on hold.*

Virtually no opportunities to cultivate and maintain client relationships as travel was highly restricted and clients were not in their offices. (Almost everyone working from home)

Decision making that would take days would not require weeks and months of delay as client staff had reduced hours and poor technology and/or access to files.

- CORPORATE CLIENT RAPPORT IS VITAL TO GETTING AND KEEPING CLIENTS THROUGH SOCIAL EVENTS, LUNCH AND DINNERS, SPORTS EVENTS AND CONCERTS, POLITICAL EVENTS AND GOLF. WITHOUT PERSONAL CONTACT CLIENT GROWTH HAS BEEN FLAT.
- NEW CONTRACTS SIGNED JUST PRIOR TO MARCH 2021 ARE ON HOLD AND LIKELY TO BE CANCELLED OR RENEGOTIATED LEADING TO LOST REVENUE

Rules and Practices

Limitations Act was placed on hold

Filing on-line

Service by email and the demise of the fax machine

- SETTLEMENT CONFERENCES BY TELECONFERENCE ONLY IS DIFFICULT
- LIMITED DIRECT COMMUNICATION FROM COURT HOUSES, COMMUNICATION HAS BEEN CENTRALIZED
- TRIALS ARE ON HOLD INDEFINITELY

Welcome Changes & Gaps

Service by email

Expanded on-line Filing

Motions by appointment

TECHNOLOGY AT COURTHOUSES MUST BE UPDATED AND EXPANDED

COURT STAFF SHOULD BE TRAINED AND RETAINED BASED ON ABILITY TO EMBRACE AND UTILIZE THE MOST RECENT, COST EFFECTIVE AND CAPABLE TECHNOLOGY TO FILE, UPDATE, REPORT AND SCHEDULE LEGAL MATTERS

Resources Available to Practitioners Who are Struggling

Jennifer Ansell, Professor, Paralegal and Law Clerk Programs, Humber College

Did you know that the Law Society of Ontario offers fantastic resources that licensees can utilize who may be struggling with wellness, mental health, drug or alcohol dependency, feeling lost in your practice, etc.?

Listed below are resources offered by the Law Society of Ontario which licensees are encouraged to consult for their personal and practice needs.

Member Assistance Program

The Member Assistance Program (MAP) is provided by Homewood Health. MAP is a confidential service funded by and fully independent of the Law Society of Ontario and LawPRO.

MAP provides secure, single sign-on or telephone access to counselling, coaching, online resources and peer volunteers. Members can get professional help with issues related to addictions, mental or physical health, work-life balance, career, family and more.

A full description of the program can be found on the Member Assistance Program website (below) or by calling 1-855-403-8922.¹

[Homeweb | My Assist Plan](#)

Coach and Advisor Network (CAN) - Paralegal | Law Society of Ontario (Iso.ca)

Coach and Advisor Network (CAN) - Paralegal | Law Society of Ontario (Iso.ca)The Law Society's Coach and Advisor Network (CAN) provides lawyers and paralegals with access to shorter-term, outcome-oriented relationships with Coaches and Advisors drawn from the professions. Coaches support the implementation of best practices and Advisors assist with substantive and procedural law inquiries on client files.²

[Coach and Advisor Network \(CAN\) - Paralegal | Law Society of Ontario \(Iso.ca\)](#)

Practice Management Helpline

The Helpline is staffed by experienced representatives and counsel. If your matter requires counsel input, a member of the Helpline's counsel team will contact you.

The Helpline is a service for Ontario lawyers and paralegals that is strictly confidential, even from other divisions or departments of the Law Society. However, it is not anonymous. When you call to discuss your situation, we will verify your identity as an Ontario-licensed lawyer or paralegal (or his or her authorized representative) to confirm that you are eligible to use our services before we answer your professional responsibility or practice management questions.

Helpline counsel, like all Ontario-licensed lawyers, remain bound by their obligations under rule 7.1-3 of the Rules of Professional Conduct to report lawyer or paralegal conduct in certain limited circumstances.³

The Helpline assists with specific matters and a detailed list of those can be found at the Practice Management Helpline website and by clicking [here](#).

To access the Helpline please call the Law Society at 416-947-3315 or toll free 1-800-668-7380 extension 3315, Monday to Friday 9:00 am-5:00 pm EST, and select the option to connect with the Helpline. Inquiries will be returned by telephone within one business day in most cases.

Member Assistance Program

[https://lso.ca/lawyers/practice-supports-and-resources/member-assistance-program-\(1\)](https://lso.ca/lawyers/practice-supports-and-resources/member-assistance-program-(1))

Coach and Advisor Network (CAN)

<https://lso.ca/lawyers/enhancing-competence/coach-and-advisor-network>

Practice Management Helpline

<https://lso.ca/lawyers/practice-supports-and-resources/practice-management-helpline>

¹ [https://lso.ca/paralegals/practice-supports-and-resources/member-assistance-program-\(1\)](https://lso.ca/paralegals/practice-supports-and-resources/member-assistance-program-(1))

² <https://lso.ca/paralegals/practice-supports-and-resources/coach-and-advisor-network>

³ <https://lso.ca/paralegals/practice-supports-and-resources/practice-management-helpline>



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TAB 2

How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

Impact on Racialized Licencees During COVID-19

Leni Yang, Paralegal

Justice by Case

March 4, 2021



IMPACT ON RACIALIZED LICENCEES DURING COVID-19

Leni Yang, Paralegal, *Justice by Case*



It has not been easy for a majority of us during the COVID-19 Pandemic lockdown that started in March 2020. No one would have known we would be in the same situation almost a year later. Unemployment, Loss of work, reduced hours, loss of support (child care) or working from home, some of us have involuntarily come into difficult situations. Whatever the situation, struggles from self-isolation and lack of socializing with others can have a huge impact on our mental health and more so on racialized persons. The barrier in language and ethnicity can be generally be a challenge for racialized licencees in a normal setting but becomes even more difficult during a pandemic lockdown. Some of the effects can include feeling isolated, feeling excluded, not being heard, having minimal support (emotionally and mentally) and women having a hard time balancing work and family with lack of resources. Whatever the struggle, it is most important during these difficult times to be inclusive and help if you can. You never know the positive impact you could have on someone's life and well-being. Please reach out to any colleagues and especially racialized colleagues that may show any of the symptoms or may be in difficult situations. Here are some resources that can be very helpful.

RESOURCES FOR MENTAL HEALTH:

- ♣ **MAP** (Member assistance program for licencees of the Law Society of Ontario)
They offer counselling services for licencees (immediately over the phone or scheduled sessions)
Contact: 1-855-403-8922
Website: www.homeweb.ca
- ♣ **TALK4HEALING (for Indigenous women)**
Contact: 1-855-554-4325
- ♣ **BIG WHITE WALL**
24/7 anonymous online education and discussion platform for mental health support
Website: www.togetherall.com
- ♣ **CONNEXONTARIO**
Ontario's mental health, addictions and problem gambling helpline. They can also provide contact information for local mental health and addictions services and supports
Contact: 1-866-531-2600
Website: www.connexontario.ca
- ♣ **CRISIS SERVICES CANADA**
Suicide prevention and support
Contact: 1-833-456-4566

THINGS WE CAN DO TO PROMOTE DIVERSITY

- ♣ Staying in touch/reaching out to colleagues
- ♣ Joining a Paralegal Association
- ♣ Joining groups on social media (LinkedIn, Facebook & Instagram)
- ♣ Inviting racialized colleagues to join an Association

- ♣ Educate yourself in becoming culturally competent (ie. Reaching out to a racialized colleague that may be celebrating a cultural holiday)
- ♣ Be aware of unconscious bias and how you could improve your perspective



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TAB 3

How to Successfully Pivot Your Paralegal Practice: Lessons from the Pandemic

Supports and Resources - Your Source/Votre Source

Teresa Donnelly, Treasurer
Law Society of Ontario

March 4, 2021





YOUR SOURCE

A full circle of supports for lawyers and paralegals

The Law Society of Ontario strives to support you at all stages of your career – professionally and personally.

Practice Management Helpline

- Confidential telephone service for all Ontario lawyers and paralegals with questions about the rules of conduct or other professionalism and practice management topics.
- Experienced representatives and counsel are available to provide information and guidance.
- To access this service call 416-947-3315 or toll free 1-800-668-7380, ext. 3315, and select the Helpline when prompted, or email practicehelpline@lso.ca

Coach and Advisor Network (CAN)

- Connects lawyers and paralegals with those who seek to develop a specific skill or tackle a practice management issue.
- Commitments are as short as one 30-minute phone call or four hours over three months.
- Coaches and Advisors are continually in demand – the hours completed may be eligible towards annual CPD Requirement.
- To take part in CAN as a participant, Coach or Advisor visit lso.ca/CAN

Discrimination and Harassment Counsel

- Funded by the Law Society of Ontario – but 100% independent and confidential.
- Confidential and available free of charge to anyone who may have experienced discrimination or harassment by a lawyer, paralegal or licensee candidate within Ontario.
- Visit dhcounsel.on.ca or call 1-877-790-2200 or email assistance@dhcounsel.on.ca

Member Assistance Program

- Confidential service funded by and fully independent of the LSO provides, secure, web or telephone access to counselling, coaching and peer volunteers.
- Licensees can get professional help with issues related to addictions, mental or physical health, work-life balance, career, family and more.
- Visit myassistplan.com or call 1-855-403-8922.



YOUR SOURCE

EDI resources & CPD opportunities

As part of its mandate, the LSO integrates Equity, Diversity and Inclusion (EDI) values and principles into its policies, programs and procedures and recognizes the diversity of the legal professions and the public.

The following resources are focused on helping to facilitate and promote EDI throughout the professions. In many cases, these resources will help you meet your Continuing Professional Development (CPD) requirements.

Do-It-Yourself EDI Toolkit for Workplaces

The LSO developed this toolkit to help legal workplaces design and deliver their own program focused on advancing EDI in the legal professions. The toolkit includes a Facilitator's Guide, Participant's Guide and Bibliography. Access the toolkit:

iso.ca/edi-programs#toolkit

Certified Specialist Program in Indigenous Legal Issues

Canada's first Indigenous specialist program includes three subspecialties, each with its own set of experience, knowledge and skills standards:

- Rights and Governance
- Litigation and Advocacy
- Corporate and Commercial

Learn more about this program and other areas of specialization at

iso.ca/certified-specialists

Guide for Lawyers Working with Indigenous Peoples

This Guide is intended to be a starting resource to help lawyers and others in the justice system to learn about Indigenous cultures and understand the interplay between Indigenous legal orders and the Canadian legal system.

Download the Guide here:

iso.ca/working-with-indigenous-peoples

CPD Programs

The LSO offers a diverse range of CPD programs in various formats throughout the year such as in-person programs, on-demand webcasts, electronic program materials, and E-Courses.

Visit store.iso.ca to learn more.

To assist licensees during this difficult time we have been releasing complimentary responsive content via store.iso.ca/cpdassists including:

Your Paralegal Legal Services Practice & COVID-19: What You Need to Know Now.

This program qualifies for 70 minutes of CPD Professionalism hours and is available free:

store.iso.ca/paralegal-covid-19

Stay Connected

- Login/register for the Portal.
- Update your status in the Lawyer and Paralegal Directory.
- Update your email address.
- Watch for important updates in the monthly Licensee Update sent to you via email.
- Follow us:



[@LawSocietyLSO](https://www.facebook.com/LawSocietyLSO)



[Linkedin.com/company/law-society-of-ontario/](https://www.linkedin.com/company/law-society-of-ontario/)



[@LawSocietyLSO](https://twitter.com/LawSocietyLSO)



VOTRE SOURCE

Des soutiens à tous les stades pour les avocat(e)s et les parajuristes
Le Barreau de l'Ontario s'efforce de vous soutenir à tous les stades de votre carrière –
professionnellement et personnellement.

Ligne d'aide à la gestion de la pratique

- Ce service téléphonique confidentiel pour les avocat(e)s et les parajuristes de l'Ontario répond aux questions sur les codes de déontologie ou sur d'autres sujets de gestion de la pratique et de professionnalisme.
- Les représentant(e)s chevronné(e)s, dont des avocat(e)s, sont à votre disposition pour offrir information et conseils.
- Pour vous prévaloir de ce service, composez le 416 947-3315 ou le numéro sans frais 1 800 668-7380, p. 3315 et sélectionnez Ligne d'aide, ou écrivez à practicehelpline@lso.ca

Réseau d'encadrement de la pratique (REP)

- Le REP connecte les avocat(e)s et les parajuristes avec les personnes qui cherchent à développer une compétence particulière ou à répondre à une question de gestion de la pratique.
- Un engagement peut durer aussi peu que 30 minutes au téléphone ou jusqu'à quatre heures sur trois mois.
- Nous avons continuellement besoin de conseillers et de formateurs – les heures consacrées au REP peuvent compter comme heures de FPC annuelle.
- Pour vous joindre au REP, comme participant, formateur ou conseiller, rendez-vous au lso.ca/REP

Conseil juridique en matière de discrimination et de harcèlement

- Financé par le Barreau de l'Ontario – mais 100 % indépendant et confidentiel.
- Service confidentiel et gratuit à quiconque aurait subi de la discrimination ou du harcèlement par un (une) avocat(e), un(e) parajuriste ou un(e) candidat(e) inscrit(e) au processus d'accès à la profession en Ontario.
- Allez au dhcounsel.on.ca/fr-ca, appelez le 1 877 790-2200 ou écrivez à assistance@dhcounsel.on.ca

Programme d'aide aux membres

- Ce service confidentiel financé par le Barreau et entièrement indépendant offre un accès en ligne ou téléphonique sécurisé à du counseling, de l'encadrement et du soutien par les pairs.
- Les titulaires de permis peuvent obtenir de l'aide professionnelle pour des problèmes de dépendance, de santé mentale ou physique, de conciliation travail-vie personnelle, de carrière ou de famille.
- Allez au www.monpam.com ou appelez le 1 855 403-8922.



VOTRE SOURCE

Ressources d'EDI et de FPC

Dans le cadre de son mandat, le Barreau intègre les valeurs et les principes d'égalité, de diversité et d'inclusion (EDI) dans ses politiques, programmes et procédures, et reconnaît la diversité des professions juridiques et du public.

Les ressources suivantes visent à promouvoir l'EDI dans toutes les professions. Souvent, ces ressources vous aideront à satisfaire à votre obligation de formation professionnelle continue (FPC).

Trousse d'outils pour créer votre propre EDI au travail

Le Barreau a créé cette trousse d'outils pour aider les lieux de travail juridiques à concevoir et à offrir leur propre programme pour promouvoir l'EDI dans les professions juridiques. La trousse d'outils contient un guide de l'animateur, un guide pour les participants et une bibliographie. Pour avoir accès à la trousse d'outils :

iso.ca/FPC-EDetl

Programme de spécialisation sur les enjeux juridiques autochtones

Le premier programme de spécialisation sur les enjeux juridiques autochtones au Canada comprend trois sous-spécialités, chacune ayant ses propres exigences et normes en matière d'expérience, de connaissances et de compétence :

- Droits et gouvernance
- Litige et représentation
- Sociétés et commerce

Pour en savoir plus sur ce programme et sur les autres domaines de spécialisation, allez au iso.ca/agrément-spécialistes

Guide pour les avocats qui travaillent avec des parties autochtones

Ce Guide est une ressource de départ pour aider les avocats et autres intervenants du système juridique à en savoir davantage sur les cultures autochtones et à comprendre l'interaction entre les ordres juridiques autochtones et le système de justice canadien.

Téléchargez le Guide ici :

iso.ca/travailler-avec-des-parties-autochtones

Programmes de FPC

Le Barreau offre une multitude de programmes de FPC dans divers formats durant l'année, comme des programmes en personne, des webémissions sur demande, des documents électroniques et des cours en ligne.

Allez au store.iso.ca pour en savoir plus.

Pour aider les titulaires de permis en cette période difficile, nous avons publié du contenu gratuit au store.iso.ca/cpdassists dont *Your Paralegal Legal Services Practice & COVID-19: What You Need to Know Now*. Ce programme accorde 70 minutes de FPC en professionnalisme et est offert sans frais au store.iso.ca/paralegal-covid-19

Restez branchés

- Ouvrez une session/inscrivez-vous au portail.
- Mettez votre catégorie à jour dans le répertoire des avocats et des parajuristes.
- Mettez votre adresse courriel à jour.
- Surveillez les mises à jour dans l'infolettre des titulaires de permis envoyées par courriel.
- Suivez-nous :



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