

Policy Number: 001		Policy: Membership Qualifications-Applications and Processes
Selection: Policies		Implementation Date:
Development By: Board of Directors		Last Revision:
Presented by: At Board meeting:		Approved by: AAPP Board of Directors

PURPOSE:

The purpose of the Membership Qualifications-Applications and Processes Policy is to provide a consistent, transparent and accountable process for legal support professionals when applying for membership with the Alberta Association of Professional Paralegals (AAPP).

The AAPP, ("Association") is committed to administering fair, consistent, ethical and transparent applications to those legal support professionals who apply for membership with the AAPP.

This Policy endeavors to provide information to applicants for the purpose of guidance and career planning.

SCOPE:**1. To Whom Does this Policy Apply?**

This policy applies to the AAPP Board of Directors, Volunteers, and Members.

This policy also applies to organizations, businesses, and post-secondary institutions that agree and/or apply to collaborate with the AAPP.

2. Where does the Policy Apply?

This policy applies wherever AAPP conducts its business. The Association functions across the Province of Alberta, in various municipalities and this policy is applicable wherever decisions are being made on behalf of or in collaboration with the AAPP.

DEFINITIONS:

1. **Affiliate Member**-is an individual who meets the requirements of one of the following categories:
 - 1.2 Is a Member of the Law Society of Alberta, or any other law society of Canada, at the discretion of the Board and/or Membership Director
 - 1.3 Is a member or student of an educational institution approved by the Board endorsing Legal Assistants, Legal Administrative Assistants, and Paralegals, at the discretion of the Board and/or Membership Director
2. **Corporate Member**-is any organization or corporation which supports the purposes of the Association. A Corporate Member shall be represented by a single individual and is not intended to provide a means for a firm to extend membership privileges to employees who would otherwise qualify as voting, student or associate members.
3. **Legal Administrative Assistant**-a trained individual working in an entry-level position or in a position that requires a particular skill set in areas of law, including, but not limited to various legal routine practices and/or administrative for the day-to-day operations that are fundamental to the administration of justice (Court Clerks, Judicial Assistants etc.); or project matters that are fundamental to the operations and requirements of law practices; and that are performed under the general supervision of a Member of the Law Society of Alberta, Alberta Judiciary or a person that is designated, appointed or employed by the Law Society of Alberta to supervise said duties.
4. **Legal Assistant**-an individual, having completed either a diploma or certificate program from a recognized post-secondary learning institution, focused on the legal field, who performs a variety of routine legal and/or administrative duties under the general supervision of a Member of the Law Society of Alberta or a person that is designated, appointed or employed by a Member of the Law Society to supervise said duties.
5. **Alberta Registered Paralegal (ARP)**-an individual, who upon provision and review of the required criteria set out herein, is deemed to perform substantive legal tasks with limited supervision, but who remains employed by and reports to a Member of the Law Society of Alberta or Alberta Judiciary.
6. **Paralegal Practitioner (PPL)**-an individual with the necessary education, training, experience, insurance and further criteria set out herein, deemed able to perform

limited substantive legal tasks without the supervision of a lawyer, in the Province of Alberta.

7. **Certificate Program**- a recognized post-secondary education program offering full-time or part-time studies at an institution recognized by Alberta Provincial Legislation and recognized by the AAPP for the purposes of membership, offering focused legal assistant or paralegal curriculum, as deemed appropriate by the AAPP.
8. **Diploma Program**-a recognized post-secondary education program offering full-time or part-time studies at an institution recognized by Alberta Provincial Legislation and recognized by the AAPP for the purposes of membership, offering focused legal assistant or paralegal curriculum, as deemed appropriate by the AAPP.
9. **Degree Program**- a recognized post-secondary education program offering fulltime or part-time studies at an institution recognized by Alberta Provincial Legislation and recognized by the AAPP for the purposes of membership, offering focused legal assistant or paralegal curriculum, as deemed appropriate by the AAPP.
10. **Student**-an individual who studies fulltime or parttime in a Certificate, Diploma or Degree Program at an institution recognized by Alberta Provincial Legislation and recognized by the AAPP for the purposes of membership.
11. **Substantive legal tasks**-tasks performed by a non-lawyer, including but not limited to: interviewing clients, legal research, preparation of pleadings, preparation of court documents, preparation of briefs including the application of legal and legal analysis for the purpose of legal argument, performed under the supervision of a Member of the Law Society of Alberta.

POLICY:

1. Vision For Our Association in applying this policy

Our Association is a network acknowledging non-lawyer legal professionals for their knowledge, skill, experience and contribution to the administration of justice within the legal system in Alberta and to support those individuals in advancement of their professional goals. The AAPP sets standards for training, experience, education and professional ethics and conduct for non-lawyer legal professionals, as defined by this Policy.

2. Application for Membership-Requirements and Application Process

2.1. Affiliate

Criteria for membership level:

- a) A Member of the Law Society of Alberta, or other law society of Canada at the discretion of the Board; or
- b) An individual or student of an educational institution approved by the Board, who endorses and supports the legal support profession(s) and the goals of the AAPP.

Steps to apply for membership:

- i. Complete online application
- ii. Upload a current copy of your Bar Card
- iii. Submit payment online
- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.2. Corporate

Criteria for membership level:

- a) An organization or Corporation which supports the goals of the AAPP and is an interest-holder in Alberta's legal system, and administration of justice, approved by the Board.

Steps to apply for membership:

- i. Complete online application
- ii. Upload all required documentation supporting membership
- iii. Submit payment online
- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.3. Student

Criteria for membership level:

- a) An individual currently attending a post-secondary certificate, or diploma program as recognized by the AAPP, either full-time or part-

time, focused on legal functions within a law office or administration of law in the Alberta Legal System; and

- b) Proof of registration and acceptance or attendance of program from institution or instructor.

Steps to apply for membership:

- i. Complete online application
- ii. Upload all required documentation supporting current enrollment in a field related, post-secondary program
- iii. Submit payment online
- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.4. Legal Administrative Assistant

Criteria for membership level:

- a) Graduate of a Certificate, Diploma or Degree program recognized by the AAPP as providing curriculum focused on legal functions of a law office or administration of law; and
- b) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement; and
- c) Commitment to the Professional Code of Conduct **OR**
- d) Having been employed full-time or part-time in a law firm or Ministry of Justice in the Province of Alberta, for a period of not less than 2 years; and
- e) Letter of Reference from supervising employer confirming dates of employment, role and duties performed for said periods of time set out above; and
- f) Commitment to the Professional Code of Conduct

Steps to apply for membership:

- i. Complete online application

- ii. Upload all required documentation supporting education and employment history
- iii. Submit payment online
- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.5. Legal Assistant

Criteria for membership level:

- a) Graduate of a Certificate, Diploma or Degree program recognized by the AAPP as providing curriculum focused on legal functions of a law office or administration of law; and
- b) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement); and
- c) Having been employed full time or part time in a law firm or Ministry of Justice in the Province of Alberta for a period of not less than 2 years; and
- d) Commitment to the Professional Code of Conduct; **OR**
- e) Having been employed full-time or part-time in a law firm or Ministry of Justice in Alberta in a role supporting the administration of justice for a period of not less than 4 years; and
- f) Letter of Reference from supervising employer confirming dates of employment, role and duties performed for said periods of time set out above; and
- g) Commitment to the Professional Code of Conduct.

Steps to apply for membership:

- i. Complete online application
- ii. Upload all required documentation supporting education and employment history
- iii. Submit payment online

- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.6. Alberta Registered Paralegal (ARP)

Criteria for membership level:

- a) Graduate of a Certificate, Diploma or Degree program recognized by the AAPP as providing curriculum focused on legal functions of a law office or administration of law; and
- b) Having been employed full-time in a law firm in the Province of Alberta or for the Province of Alberta, Ministry of Justice, for a period of not less than 5 years; and
- c) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae;
- d) Where confirmation that substantive legal tasks are performed by the applicant has been provided with the membership application from the employer of the applicant; and
- e) Commitment to the Professional Code of Conduct **OR**

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- f) Having been employed full-time in a law firm in the Province of Alberta for a period of not less than 10 years; and
 - g) Where confirmation that substantive legal tasks are performed by the applicant has been provided with the membership application from the employer of the applicant; and
 - h) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae; and
 - i) Commitment to the Professional Code of Conduct **OR**

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- j) Employee of the Government of Alberta Ministry of Justice in a role supporting the administration of justice for a period of not less than 10 years full-time employment; and

- k) Where confirmation that substantive legal tasks are performed by the applicant has been provided with the membership application from the employer of the applicant; and
- l) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae; and
- m) Commitment to the Professional Code of Conduct

Steps to apply for membership:

- i. Complete online application
- ii. Upload all required documentation supporting education and employment history and tasks performed
- iii. Submit payment online
- iv. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.6.1 Steps for appeal of a decision or denial of membership level:

- i. Email the Director of Membership at membership@alberta-paralegal.com to request a review of your application.
- ii. The Director of Membership or delegate will review the application and may request further information or confirmation, or direct the Applicant to pursue further professional development, or schedule the Applicant for an interview for the purpose of ascertaining greater knowledge and clarity as to the Applicant's knowledge of substantive law and procedures.

2.7. Paralegal Practitioner (PPL)

Criteria for membership level:

- a) Graduate of a Certificate, Diploma or Degree program recognized by the AAPP as providing curriculum focused on legal functions of a law office or administration of law; and
- b) Graduate of a Post-Diploma Certificate of Degree Program recognized by the AAPP as providing advanced substantive legal curriculum in the Province of Alberta; equivalencies may be considered; and

- c) Having been employed full-time in a law firm in the Province of Alberta or for the Province of Alberta, Ministry of Justice, for a period of not less than 5 years; and
 - d) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae; and
 - e) Confirmation that substantive legal tasks are or have been performed by the applicant by way of three (3) letters of professional reference; and
 - f) Completion of interview by the Director of Membership or delegate for the purpose of ascertaining greater knowledge and clarity as to the Applicant's knowledge of substantive law and procedures; and
 - g) Professional Errors & Omissions Insurance not less than \$2,000,000; and
 - h) A Criminal Record Check; and
 - i) Commitment to the Professional Code of Conduct; **OR**
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- j) Graduate of a Certificate, Diploma or Degree program recognized by the AAPP as providing curriculum focused on legal functions of a law office or administration of law; and
- k) Having been employed full-time in a law firm in the Province of Alberta or for the Province of Alberta, Ministry of Justice, for a period of not less than 10 years; and
- l) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae; and
- m) Confirmation that substantive legal tasks are or have been performed by the applicant by way of three (3) letters of professional reference; and
- n) Completion of interview by the Director of Membership or delegate for the purpose of ascertaining greater knowledge and clarity as to the Applicant's knowledge of substantive law and procedures; and
- o) Professional Errors & Omissions Insurance not less than \$2,000,000; and
- p) A Criminal Record Check; and

q) Commitment to the Professional Code of Conduct; **OR**

- r) Having been employed full-time in a law firm in the Province of Alberta or for the Province of Alberta, Ministry of Justice, for a period of not less than 15 years; and
- s) Copies of all Certificates, Diplomas or Degrees with a list of classes completed (an unofficial transcript is an ideal example of this requirement), and current Curriculum Vitae; and
- t) Confirmation that substantive legal tasks are or have been performed by the applicant by way of three (3) letters of professional reference; and
- u) Completion of interview by the Director of Membership or delegate for the purpose of ascertaining greater knowledge and clarity as to the Applicant's knowledge of substantive law and procedures; and
- v) Professional Errors & Omissions Insurance not less than \$2,000,000; and
- w) A Criminal Record Check; and
- x) Commitment to the Professional Code of Conduct

Steps to apply for membership:

- i. Complete online application
- ii. Upload all required documentation supporting education and employment history and tasks performed
- iii. Submit payment online
- iv. Arrange interview and conduct interview
- v. Receive confirmation from the Association as to granting/approval of membership level.

*****Note: membership will not be approved until all criteria have been met and documentation provided to support submissions.***

2.7.1 Steps for appeal of a decision or denial of membership level:

- i. Email the Director of Membership at membership@alberta-paralegal.com to request a review of your application.
- ii. The Director of Membership or delegate will review the application and may request further information or confirmation, or direct the Applicant to pursue further professional development, or schedule the

Applicant for a further interview for the purpose of ascertaining greater knowledge and clarity as to the Applicant's knowledge of substantive law and procedures.

3. Responsibility and Authority

It is the responsibility of the AAPP to ensure those individuals who are performing legal support services outside of the supervision of a Member of the Law Society, Ministry of Justice of Judiciary, are equipped to perform a high standard of legal services worthy of Albertans and worthy of the paralegal title. It is also the responsibility of the AAPP to ensure those members granted with a Paralegal Practitioner Membership carry appropriate insurance to protect Albertan consumers as well as the AAPP member.

The AAPP reserves the right to approve, deny or suspend membership applications, based on review of information submitted for consideration and may from time to time strike a committee to review applications.

3.1 Periodic Membership Audits

The AAPP shall, at its sole discretion, audit the application documentation of various members and membership levels to ensure compliance with the membership level and any member being audited shall comply with any requests for updated information.

3.2 Complaints of Conduct of Members

The AAPP shall receive and review complaints of conduct which are against its members by members of the public or legal stakeholders. The AAPP shall follow the procedures set out in the Conduct & Disciplinary Policy of the AAPP. All members of the AAPP acknowledge the commitment to the Code of Professional Conduct applicable to their membership level and commit to operating and behaving in a manner reflective of the Code of Professional Conduct.

4.0 Review of the Policy

The effectiveness and application of this policy will be reviewed from time to time by the AAPP Board of Directors.

Upon the approved motion of the Board, amendments of this policy shall be made and put into effect as at the date declared in the motion or at date of approved motion.

END OF DOCUMENT