

HISTORY OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS

1995 - 1996

The incoming Board held their first meeting on June 3, 1995. President Address presented her goals for the Division for the coming year which included making LAD more "user friendly" by educating members about the Division, providing more CLE and information concerning the profession, and increasing the membership through strengthened relations with local associations. The following Directors were appointed to serve as Board Advisors or Liaisons: Annual Meeting - Wendi Rogers; Elections - Virginia Gil; Membership - Diane Sharer; Professional Development - Diane McQuire; Professional Ethics - Carla Daggett; Publications - Luanne Womack; Public Relations - Ellen Lockwood; NALA - Lisa Sprinkle; NFPA - Wendi Rogers; LAC - Sally Address; TAPA - Sally Address; and Long Range Planning Task Force - Melanie Villarreal.

The Board approved the charges from the 1995-1996 Annual Meeting Committee. The 1996 Annual Meeting will be held in Dallas, which meeting will be advertised in the April issue of the news bulletin. A reference notebook will be prepared for use by the 1997 Annual Meeting Committee.

Other Board action included approval of charges to the following committees: Publications, Elections, Public Relations, Membership, Professional Ethics, Professional Development, Budget and Finance, and Procedures Manual. Directors Grace Guillot and Melinda Hicks were appointed as liaisons on behalf of the Division for Texas Forum.

The Fall board meeting was held on September 29-30 at the Lago Vista Conference Center in Lago Vista. The Board of Directors met with the State Bar Standing Committee in conjunction with Texas Forum XIV. Johnny Lacy, CPA, presented the Audit Report and recommended that the Division continue to maintain three to four months' funds in reserve. The Board welcomed new director, Dawn Crider, who replaced Carla Daggett who resigned after the Board meetings held in June, 1995. Connie Lawrence replaced Carla Daggett as Board Advisor to the Ethics Committee. President Address reiterated the Division's policy regarding Division mailing labels which can be purchased through the Bar, but which cannot be given out. Liaison reports were presented by Lisa Sprinkle (for NALA) and Wendi Rogers (for NFPA). Norma Hackler reported current membership for the Division totals 1,959. Debra Crosby, past Division Chair and Chair of the Task Force on Long Range Planning, and Chris Levy, Chair of the Publications Committee, reported to the Board on the status of their respective committees.

The Board approved the 1995-1996 budget as presented and amended at the meeting. President Address reported on the opinion of the Division's counsel that the Division is not subject to the Texas Open Meetings Act. (A letter from Russell S. Johnson, Attorney at Law, dated July 26, 1995, addressed to Sally Address, President, expressly states that the Division is not subject to the Open Meetings Act.)

The January board meeting was held on January 12-13, 1996, at the Wyndham Southpark Hotel in Austin. President Address announced the resignations of Luanne Womack, District 3, and Diane McQuire, District 9.

Executive Director Norma Hackler reported that current membership in the Division totals 2,153. The Personal Injury Seminar will be taped this year, and will be offered in District 11 in Big Spring. Texas Board of Legal Specialization is surveying to determine a new subject area for specialty examination and will make a recommendation to the Commission. In 1997, a fourth test subject area will be established. As of the January Board meeting, applications for the 1996 examination period were as follows: Civil Trial Law (36), Family Law (26), and Personal Injury Trial Law (29), for a total of 91 applications.

Norma Hackler provided the report of Martha Jones (CEC) concerning Advanced Seminars; a discussion was held about the possibility of providing two in the Spring and two in the Fall to eliminate the logistics of putting on three to four seminars in a condensed period of time.

Because of their size and the large numbers of members, re-organization of Districts 1 and 2 was discussed. The Long Range Planning Task force may be asked to take a look at geographical reorganization. Various issues pertaining to membership were discussed, including the fact that the Bar denied the Division's request to be included in the Texas Legal Directory. The Standing Rules were revised to allow out-of-state attorneys to verify membership application for the Division.

Chris Levy, Chair of the Publications Committee reported on various matters pertaining to the *Texas Paralegal Journal* and the *TPJ Etc.*

Various other committee matters were discussed, including, revisions to the Procedures Manual, sanctions for Directors not performing their duties, and the community services video being prepared by Lisa Sprinkle and El Paso Community College. The Board voted to donate 5% of the net profits from Division seminars to the Children's Miracle Network. Debra Crosby reported on the Long Range Planning Committee's work, including a review of the history of the Bar to determine how standards were first put into place for attorneys. This information would prove helpful if the Division voted to require mandatory CLE for membership in the Division. Johnny Oswald of the Bar's General Counsel's Office provided information regarding the Legal

Administrators Division and plans for seminars relating to running offices and small law firms.

Final items of business included the appointment of District 3 Director Melissa D. Sherman, CLA, to fulfill the term of Luanne Womack.

The Spring meeting of the Board was held on April 19-20, 1996, at the Wyndham Southpark Hotel in Austin. The Board welcomed new Directors, Melissa Sherman, CLA, District 3, and Donna Dendy, PLS, CLA, District 9. President Address reported on several matters, including a request from the State Law Library that the Division purchase a chair at the Library and that Wendi Rogers will be a speaker at the NFPA Annual Meeting in Columbus, Ohio.

Executive Director Norma Hackler reported that the Division's membership as of April, 1996 is 2,263, an increase from April, 1995. The Division's membership goal is 4,000. A motion was also passed approving the Professional Development Advisory Commission (PDAC) to be changed to a special committee called "Continuing Legal Education Committee" to be composed of the Continuing Education Coordinator, the Executive Director, the President-Elect, the Treasurer, the Practice Skills Seminar Coordinator, and one other Division Member appointed by the President. The President-Elect will be the Board Advisor of this special committee.

Brooks Davis, Bar of Texas Insurance Trust, provided a presentation of three types of insurance programs offered. Division members are eligible, individually, for membership in each program.

President Address presented a slate of candidates for officers for the 1996-1997 terms. The slate of nominees was elected by consensus as follows: Ellen Lockwood, Treasurer; Lisa Sprinkle, Parliamentarian, and Kelly Cavin, Secretary.

Director Sprinkle reported on her research of the Standing Rules regarding the expulsion of a member of the Division. The Standing Rules were amended to add Section III G 5 f. If at anytime during an investigation, it is determined by the subcommittee chair that the legal assistant has pled guilty or *nolo contendere* to a felony offense involving moral turpitude, that legal assistant shall become immediately subject to any sanctions allowable under III G 13. The Board then went into executive session, after which meeting motions were submitted and passed that Lela Ann Morrison be expelled from the Division, that her expulsion be reported to the *Texas Bar Journal* for publication, and that a notice of her expulsion be submitted to the Texas Board of Legal Specialization.

The Board watched the pilot program of *Legally Speaking* which will be shown at the Annual Meeting. The Board also authorized budgeting for taping of the cable television program. Publications Chair Chris Levy reported on various matters including the development of a media kit and the establishment of an advertising committee for TPJ and *TPJ, etc.* The Membership Committee recommended and a motion passed to effectuate the establishment of a new associate membership category for the Division wherein a person employed in the legal profession, although not performing substantive work 80% of the time, may become a member if he or she is a Certified Legal Assistant or Board Certified by the TBLS.

Committee Chairs for 1996-1997 were approved by consensus as follows: Annual Meeting - Sharon Wagner; Continuing Education - Martha Jones; Elections - Adele Hernandez; Historian - Gigi Linne; Long Range Planning Task Force - Debra Crosby; Membership - Javan Johnson; Professional Development - Kristine Farmer; Professional Ethics - Rhita Koches; Public Relations - Cynthia Minchillo; and Publications - Chris Levy. New Business discussed included a report on research by Wendi Rogers for developing procedures for communicating with the Bar and a report on Division policy regarding concealed handguns.

The Board met during the week of June 20, 1996, at the Wyndham Anatole Hotel during the Annual Meeting in Dallas. Sally Andress reported to the Board that Tony Alvarado has advised the Division that our disciplinary action allows for expulsion information to be published in the *Texas Paralegal Journal*, but not in the *Texas Bar Journal*. Other discussion concerned how to coordinate accreditation for LAD seminars. It was reported that the LAC has completed a pamphlet called "Why Your Firm Needs a Legal Assistant."

Executive Director Norma Hackler reported that the Division's membership is 2,342 members. Specialty Certification will be offering certification in Criminal Law for this year, with applications being available for September 1, 1996. Texas Forum XV is to be held on September 27, 1996. Action taken at the meeting included approval of the Executive Director's contract for the coming contract year.

The Annual Meeting was held on June 21, 1996 at the Wyndham Anatole Hotel in Dallas. Welcoming remarks were made by Lindi Massey, Annual Meeting Chair, Deborah Oaks, President of Dallas Association of Legal Assistants, and Sally Andress, President of the Division. President Andress introduced special guests Tom Hanna, Gary McNeill, and Sally Emerson. The Outstanding Committee Chair awards were presented to Eva-Lisa Dockery, outgoing Chair of Public Relations and to Chris Levy, Chair of Publications, for their outstanding service to the Division. After recognizing the Annual Meeting committee as a whole, President Andress recognized the 1995-1996 Committee Chairs: Lindi Massey, Annual Meeting; Adele B. Hernandez, Elections; Javan Johnson, Membership; Melanie Villarreal, Procedures Manual; Key Redburn, Professional Ethics; Sylvia J. Coatney, Professional Development; Eva Lisa Dockery, Public Relations; Christine Levy, Publications; Debra Crosby, Long Range Planning Task Force; and Martha Jones, PDAC. Melanie Villarreal presented a plaque of recognition and gratitude to outgoing President Andress.

Keynote speaker for the luncheon was the Honorable Carolyn Wright whose topic was "Overcoming Conventional

Expectations." Gary McNeill presented certificates to the newly Board Certified Legal Assistants who were present at the luncheon. President Sally Andress installed the 1996-1997 officers as follows:

President Melanie Villarreal, CLA, TBLs Board Certified Legal Assistant - Civil Trial
 President-Elect Wendi Rogers, CLA, TBLs Board Certified Legal Assistant - Personal Injury
 Treasurer Ellen Lockwood, CLA
 Secretary Kelly Cavin, CLAS, TBLs Board Certified Legal Assistant - Civil Trial
 Parliamentarian Lisa Sprinkle, CLAS, TBLs Board Certified Legal Assistant - Civil Trial

Legal Assistants Division Board of Directors 1995 - 1996

Officers:

President:	Sally Andress
President-Elect:	Melanie Villarreal, CLA
Treasurer:	Rhita Koches, PLS, CLA
Secretary:	Kelly Cavin, CLAS
Parliamentarian:	Lisa Sprinkle, CLAS

Directors:

Cathy Blackwell Jackson, CLA	District 1*
Wendi A. Rogers, CLA	District 2
Melissa D. Sherman, CLA	District 3**
Dawn Crider, CLA	District 4***
Ellen Lockwood, CLA	District 5
Connie Lawrence	District 6
Kelly Cavin, CLAS	District 7
Leigh Burton, CLA	District 8
Diane McQuire	District 9****
Grace Guillot, CLA	District 10
Diane Sharer, CLAS	District 11
Barbara Fahlender	District 12
Melinda Hicks	District 13
Rhita Koches, PLS, CLAS	District 14
Virginia P. Gil	District 15
Lisa Sprinkle, CLAS	District 16

*Jim Buchanan was appointed in April, 1996, to complete the term of Cathy Blackwell Jackson who resigned

**Luanne Womack resigned as District 3 Director; at the January, 1996 Board meeting; Melissa D. Sherman, CLA, was elected to fulfill the term

***Carla L. Daggett was District 4 Director until July, 1995, at which time she resigned; Dawn Crider, CLA, was appointed to that position in August, 1995

****Resigned; Donna Dendy was appointed to that position in April, 1996 to fulfill the term