

# HISTORY OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS

## 2000 - 2001

The Incoming Board meeting was held on June 23-24, 2000. An applicant for membership was denied based on their felony conviction. Martha Jones and Janet Soderman were appointed Annual Meeting chairs. The following committee chairs were also appointed: Elections, Jo Ann Simms; Long Range Planning Task Force, Debra Crosby; Membership, Joncilee Miller; Procedures Manual, S. Kristine Farmer; Professional Ethics, Ellen Lockwood; Professional Development, Jodye Kasher; Publications, Nancy McLaughlin; and, Public Relations, Sharon Wagner. President Johnson also made Liaison appointments.

The Board approved the offer of Craig Hackler to invest LAD funds, as specified in his correspondence of June 20, 2000. The firm of Raymond James will manage the funds at no charge.

Discussion was held regarding a salary survey to be conducted by LAD. Committee charges were approved. Director Mariann Porter was selected to chair the special committee on the salary survey.

The Texas Forum XIX topic for 2000 was the "Alternative Career Track." There was emphasis on the Physicians' Assistant and how that program compares to the direction of the legal assistant profession.

The Fall board meeting was held at the Omni Inn in Austin on October 13-14, 2000. Martha Jones was approved as Director for District 4 to fill the vacancy declared in that district.

President Johnson will follow up with the State Bar College regarding membership for legal assistants. President Johnson will gather information regarding various CLE requirements by other associations and TBLS and reply to the State Bar College.

Melinda Jackson represented LAD at the TAPA meetings in Houston since TAPA was scheduled at the same time as this board meeting. Ms. Jackson will report back.

Membership in the Division remains at about the same as in 1993. Not much growth has been seen. LAD is starting an e-group linked from LAD's website. It was reported that LAU 2001 will be at the Dallas Renaissance Hotel. Scholarships will be available.

The Board approved the formation of a joint task force with the Bar, consisting of attorneys, legal assistants, and judges, to further research the possibility of more formally defining the paralegal profession in Texas.

Discussion was held regarding increasing membership dues. Financial responsibility was discussed. The Salary Survey committee was instructed to move forward with the survey and meet December deadlines.

President Johnson reported that Director Joan Beishir was able to get the *Legally Speaking* program on the air on the cable access station in Longview. The program will begin airing immediately.

A discussion was held regarding no longer holding elections in districts were the director candidate was running unopposed. A motion was made and failed. Various directors reported on activities in their districts for CLE events and Legal Assistants' Day events.

LAD approved the purchase of a lap top computer for use by the Secretary.

A teleconference board meeting was held in December. It was reported that Nancy McLaughlin, long-time LAD member and Publications Chair, was killed in an automobile accident on December 8, 2000. The Spring 2001 issue of the *Texas Paralegal Journal* will be dedicated to the memory of Nancy. Nancy's presence in all our lives will be missed.

The spring board meeting of LAD was held February 23-24, 2001 at the Texas Scottish Rite Hospital in Dallas. Carolyn Goff was appointed as Parliamentarian to fulfill the unexpired term for 2000-2001. Melinda Jackson was welcomed as the new director for District 1.

LAD reported a \$19,000 profit on LAU 2000. The Joint LAC/LAD Task Force met and discussed what other states are doing with regard to regulation and the different types of regulation. There was a consensus among the Joint Task Force that the Texas Supreme Court would be the best avenue for regulation, in some form, at this time. Research groups were established and various members were assigned the task of contacting different individuals to gather additional information. The next meeting of the Task Force was scheduled for spring 2001.

Melinda Jackson was appointed chair of the Ad Hoc Committee on Guidelines to Speaking to Law Firms Committee. Nothing

new has been received from the State Bar College regarding membership for legal assistants. Johnny Lacy, CPA, LAD's auditor, commended the Division on its profit from LAU.

Discussion was held regarding the Division Coordinator's salary contract. A raise and a contingent bonus for CLE activities was approved in the contract.

All LAD accounts were closed at Chase Bank and moved to Raymond James. The LAD accounts are earning interest of approximately 5% as opposed to the bank's less than 1% interest.

S. Kristine Farmer was approved to fulfill the duties of Treasurer while Director Joan Beishir is incapacitated due to surgery.

Debra Crosby, Chair of the Long Range Planning Task Force, informed the Board that Hawaii is proposing court rules regarding legal assistants and educational requirements, as well as rules regarding the utilization of legal assistants. This information is available on the LAD website.

The cost of attending the Bar Convention was increased from \$10.00 to \$20.00 for legal assistants. Directors were encouraged to promote attendance at LAD's Annual Meeting.

No information was received from the LAC regarding revisions to the *Attorney's Guide to Practicing with Legal Assistants*, the LAD Code of Ethics, or the Guidelines for the Utilization of Legal Assistant Services by Attorneys. Director Hammer reported that she had sent her committee's recommendations to the LAC.

The Board discussed the salary survey questionnaire and it was decided that the survey would be sent first to LAD members. The survey was named "Legal Assistant Division Employment Survey." Names of individuals completing the survey would be placed in a drawing for free tuition to LAU 2001, planned for September 5-8, 2001 in Dallas.

Director McDowell was proceeding with efforts to get *Legally Speaking* aired in Midland. The program continues to be aired in El Paso and Longview.

Rhonda Brashears was elected as President-Elect for the 2001-2002 term. Mary McDowell was elected Secretary, Joan Beishir was elected Treasurer, and Carolyn Goff was elected Parliamentarian for 2001-2002.

The following awards will be given at the Annual Meeting in June 2001: Chair of the Year, Lisa Sprinkle; Special Award, Joncilee Miller and Jodye Kasher.

The LAU scholarship was renamed to "The Nancy McLaughlin LAU Scholarship" in memoriam and honor of Nancy's work at past LAU seminars and her support of continuing legal education.

Discussion was held regarding a membership directory, placing an ad in the *Texas Bar Journal* to encourage attorneys to have their legal assistants join the Division, and media kits for advertising in the TPJ. The importance of promoting membership in the Division was stressed to the Board. Many marketing methods were discussed.

The June board meeting was held at the Annual Meeting at the Radisson Town Lake in Austin on June 14, 2001. At the Outgoing Board Meeting, it was announced that the State Bar College has officially approved Associate Membership for legal assistants in the State Bar College and the requirements for membership are being established. Discussion with the State Bar College included how to track CLE hours.

LAD continued its discussions with the Bar regarding allowing legal assistants access to mytexasbar.com. Bar President Lynn Liberato is in favor of it, but questioned whether there would be additional cost to the Bar.

LAD participated in the Spring TAPA meeting in Lubbock. The Long Range Planning Task Force was continuing its work with the Joint Task Force.

The salary survey had a 41% return as of this meeting, and reminders were being sent.

Development of an ad to market LAD in the *Texas Bar Journal* was discussed in order to attempt to increase membership. Continued discussions were had regarding a membership directory and the attempt to be included in the Texas Legal Directory.

A Board decision was made that the Immediate Past President would become Historian for the following year.

Several districts held joint CLE events that provided income to LAD.

## **Legal Assistants Division Board of Directors 2000 - 2001**

### **Officers:**

President:	Javan Johnson, CLAS
President-Elect:	S. Kristine Farmer
Treasurer:	Joan E. Beishir, CLA
Secretary:	Rhonda Brashears, CLA
Parliamentarian:	Diane McQuire*** Carolyn Goff

**Directors:**

Diane McQuire	District 1*
Kim H. Cantu, CLA	District 2
Patricia Hammer, CLA	District 3
Martha Jones, CLA	District 4**
Debra Crosby	District 5
Jeanne Fairman, CLA	District 6
Rhonda J. Brashears, CLA	District 7
Karla Schwemmer, ALS, PLS	District 8
Joyce Biggar	District 9
Ingrid Bumstead, CLAS	District 10
Mary McDowell, CLA	District 11
Tamara Null, CLA	District 12
Carolyn Goff	District 13
Joan E. Beishir, CLA	District 14
Michelle Salazar	District 15
Mariann Porter, CLA	District 16

\* Resigned fall of 2000. Melinda Jackson was approved by the Board to fill the vacancy for District 1

\*\*Martha Jones, CLA was approved by the Board to fill the vacancy for District 4

\*\*\* Resigned Fall, 2000; Carolyn Goff was elected in February 2001 to fill the position of Parliamentarian.