

HISTORY OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS

2002 - 2003

The Incoming Board met at the Wyndham Garden Hotel in Dallas on June 14, 2002. The Board discussed sending Broadus Spivey a card and gift in appreciation to thank him for including the Division with invitations to the Bar Leaders Recognition Luncheon and the Bar Symposium at the 2002 Annual Meeting.

Committee Chairs appointed were:

Annual Meeting: Penny Gillett, Chair
Melinda Jackson/Carolyn Goff, Board Advisor

Elections: Jennifer Fielder, Chair
Karla Schwemmer, PLS, RP, Board Advisor

Long Range Planning Debra Crosby, Chair
Task Force: Rhonda Brashears, CLA, TBLS, Board Advisor

Membership: Joncilee Miller, CLA, Chair
Kim Cantu, CLA, Board Advisor

Professional Development: Kristy Ritchie, Chair
Pat Hammer, CLA, Board Advisor

Professional Ethics: Ellen Lockwood, CLAS, RP, Chair
Virginia Coronado, TBLS, Board Advisor

Public Relations: Javan Johnson, CLAS, TBLS, Chair
Carolyn Goff, Board Advisor

Publications: Debra Crosby, Chair
Ellen Lockwood, CLAS, RP, Board Advisor

Liaison appointments were as follows:

NALA: Sandy Eaves, CLAS, TBLS
NFPA: Pat Hammer, CLA
Legal Administrators: Virginia Coronado, TBLS*
LAMA: Melissa Sherman, CLA, TBLS
TALS/NALS: Karla Schwemmer, PLS, RP
TYLA: Melissa Sherman, CLA, TBLS

* Virginia Coronado resigned from this position and liaison position was discontinued.

The Board discussed goals that would be set for this fiscal year and several ad hoc committees were discussed to accomplish these goals. The following ad hoc committees were formed:

Public Service Ad Hoc Committee. This committee was formed to provide information regarding LAD to attorneys at CLE events around the state, when possible. This committee was chaired by Lisa Sprinkle, CLAS and Melissa Sherman, CLA, TBLS served as Board Advisor.

Post Card Marketing Ad Hoc Committee. This committee was formed to develop a post card to be sent to non-members with information regarding the benefits of LAD membership. This committee was chaired by Stephanie Hawkes and Mariann Porter, CLA served as Board Advisor.

Mandatory Continuing Legal Education Ad Hoc Committee. This committee was formed to investigate the pros and cons as well as opinions regarding mandatory CLE for active, freelance, and associate LAD members. Carolyn Goff chaired this committee with Rhonda Brashears, CLA, TBLS as Board Advisor.

Membership Revision Ad Hoc Committee. This committee was formed to review the LAD applications and present suggestions for updating and streamlining. Kathryn Moore chaired this committee with Melissa Sherman, CLA, TBLS served as Board Advisor.

Online CLE Ad Hoc Committee. This committee was formed to investigate the possibility of developing online CLE for LAD. This committee consisted of Pam Horn, Chair, Tamara Null, CLA and Carol McRoberts, CLA.

LAU 2002 remained as a ad hoc committee chaired by Kristine Farmer and Rhonda Brashears, CLA, TBLS served as Board Advisor.

Membership Expansion Ad Hoc Committee was chaired by Pam Horn.

District Realignment Ad Hoc Committee was chaired by Rhonda Brashears, CLA, TBLS.

Budget Ad Hoc Committee was chaired by Mariann Porter, CLA.

LAD Coordinator Contract Ad Hoc Committee was chaired by Melissa Sherman, CLA, TBLS.

The Board discussed the need to update the LAD website and it was agreed that avenues for revision would be looked into.

The Bar's LAC is working on clarifying the definition of legal assistant, legal education and substantive legal work. The Task Force will continue to work with the LAC on these issues. LAD continues to work with the LAC to revise the Attorneys Guidelines to Practicing with Legal Assistants.

Texas Forum XXI will be held on November 1, 2002. President Brashears and several directors agreed to attend the Texas Forum on behalf of LAD.

The Board began to research the issue of obtaining software which will allow the secretary to scan and search the minutes of the Division.

LAU 2002 was held in Houston at the Inter-Continental Hotel, September 18-20, 2002. The LAU Committee members were Robin Swattes, Speaker Chair, Javan Johnson, CLAS and Jennifer Barnes, Marketing Co-Chairs, Stephanie Hawkes, RP and Melinda Jackson, Vendor Co-Chairs, Carolyn Goff and Kathryn Moore, CLA, Socials Co-Chairs, Ellen Lockwood, CLAS, RP, Registration Chair, Norma Hackler, CMP, Kristine Farmer, Chair and Rhonda Brashears, CLA Board Advisor. There were 60 volunteers and 254 registrants. The Division's profit was approximately \$10,000.00. This year the seminar began on Wednesday afternoon and ended on Friday afternoon and one-day registration was offered for the first time. Two socials and a Friday luncheon were again apart of the seminar social events.

The Fall Board meeting and retreat was held on October 19-20, 2002, in Bandera.

The 2002 Fall TAPA Meeting was hosted by the Metroplex Association of Corporate Paralegals was October 4-5, 2002 in Grapevine. Most of the organizations in attendance reported a problem with recruiting of new members and member participation.

MyTexasBar.com was made available to Division members using their own SBOT membership numbers.

President Brashears appointed herself as Committee Chair of LAU 2003. The LAU 2003 Planning Committee Chairs were Ellen Lockwood, Speakers; Javan Johnson, Socials; Melinda Jackson and Jaime Moore, Vendors; Jim Hollerbach, public member; Jennifer Barnes and Kristy Ritchie, Marketing; Norma Hackler, Meeting Planner. The 2002 LAU Planning Committee developed a procedures manual for future LAU committees.

The Board or Directors voted to swap ads with *Legal Assistant Today*, *Texas Lawyer*, *Texas Bar Journal*, NALA, and LAMA if given the opportunity in an effort to get the ad developed by Tri-Vue out to the public. Dell Computers began offering a 10% discount to all Division members.

It was announced that the NALA National Convention will be held in San Antonio in 2003 and the Board agreed to swap a booth the NALA at the National Convention and allow NALA to have a booth at LAU. This was felt to be a wonderful opportunity to give the Division some exposure at the national level.

The Board voted to purchase new membership cards for the next renewal period.

Discussion was held regarding the Division's current liaison relationship with the Legal Administrators Division and that the liaison appointment is no longer needed because they are a member of the Counsel of Chairs. The Board voted to discontinue the liaison appointment with the Legal Administrators Division.

The Board discussed the effects of the falling membership and need to very carefully watch the budget. President-Elect Sherman agreed to compile the dues paid by various TAPA associations from around the state to determine if it would be prudent to increase LAD dues. Other ways of cutting costs were discussed but the Board decided they did not want to cut any membership benefits.

Publications Chair, Debra Crosby reported that she will work with Steve Eisenberg to completely revamp the LAD website.

The Board discussed the issue of sustaining members using the LAD e-group for advertisement and it was determined that this was not the intent of the e-group and sustaining members would be notified of this decision.

President-Elect Melissa Sherman, Carolyn Goff, Parliamentarian and Pam Horn were appointed to the Bylaws and Standing Rule Committee. One of the issues reviewed was a possible bylaws amendment adding a standing committee for Continuing Legal Education.

Melinda Jackson was appointed to Chair the President-Elect Elections Committee. President-Elect Melissa Sherman was appointed to Chair the Officer Elections Committee.

The Board voted to accept one user Summation license and software in exchange for advertisement in the TPJ to use for the scanning of the LAD minutes.

The Board held a telephone conference on December 19, 2002.

LAD continued discussion with online service providers regarding the possibility of developing an online CLE program. The contract developed between Mike De La Rosa was sent to the Bar for their review and approval.

The Board approved the annual requirement of 6 hours of continuing legal education (not more than 1/3 non-participatory hours) to maintain active, freelance, and associate membership in the Division effective for the 2004-2005 fiscal year.

The Board met on February 7 - 8, 2003, at the Texas Scottish Rite Children's Hospital, Dallas. Texas Forum XXI was held in Austin on November 1, 2002. The theme was "Advocacy for the Profession." Attendance was low in comparison with past forums but the information exchanged was very helpful and included pro bono and scholarship information available in Texas.

President Brashears was appointed as the contact for State Bar College applications to review the submitted CLE.

The Spring 2003 TAPA meeting will be held in San Antonio and both President Brashears and President-Elect Sherman will attend the meeting on behalf of the Division.

LAU 2003 was discussed and it will be held in San Antonio at the Omni Hotel, October 1-3, 2003. The seminar will again be held Wednesday - Friday. The first meeting was held at the conclusion of the February Board meeting. LAU 2004 will be held in Fort Worth.

The Board discussed the possibility of providing the *TPJ*, etc. by e-mail or even on the website to cut costs without limiting member benefits.

An ad hoc committee on budget was appointed to address all budget concerns for the 2004 budget. Director Porter was appointed as chair and Directors Lockwood, Cantu, and Null were also appointed.

Plans for the 2003 Annual Meeting were discussed. Annual Meeting will be held in Houston. Justice Eva Guzman of the 14th Court of Appeals agreed to be the keynote speaker. The Annual Meeting Committee entertained ideas of a Friday night social at an offsite location. Director Goff agreed to serve as the Board Advisor to this committee following the resignation of Director Jackson.

Special awards were awarded to Kristine Farmer for her service of LAU 2002 Chair, Broadus Spivey for his recognition of legal assistants at the 2002 Annual Meeting, and Carolyn Goff for her work on the Continuing Legal Education Ad Hoc Committee. Jennifer Fielder, Elections was chosen for Committee Chair of the Year.

Carolyn Goff, as chair of the Continuing Education Ad Hoc Committee, compiled an article for the TPJ to explain the procedure for gathering CLE to prepare for the mandatory CLE requirements for the 2004-2005 membership renewal.

Revised applications for the Active, Student, and Associate membership categories were approved. The Board discussed further research into establishing another category of membership to cover some of the other types of applicants who seek membership in the Division such as retired legal assistants, administrators, and paralegal program administrators.

The Board voted to make individuals who have been convicted of a felony ineligible for membership in LAD.

The 2003-2004 officer elections were held. Ellen Lockwood was nominated for Treasurer and Mariann Porter was nominated for Parliamentarian. Pam Horn was nominated from the floor for Secretary. The nominated candidates were elected by the Board to serve as the 2003-2004 Officers.

Eleven ballots were marked and received prior to the Board meeting and Kim Cantu was elected President-Elect for the 2003-2004 term.

There was a recommendation that a Special Award also be presented to Mark Ward of Tri-Vue at the Annual Meeting for his

development of the LAD ad.

The Board voted to increase membership dues. The dues will be increased beginning with the 2003-2004 renewal and application period to \$70.00 for Active and Associate, \$25.00 for Student, and \$200.00 for Sustaining.

An ad hoc committee was appointed to review the need for district realignment or consolidation. The committee was chaired by President Brashears and composed of Director McDowell and President-Elect Sherman.

The Spring TAPA meeting was hosted by AAPLA in San Antonio and was well attended. The Division was presented by President Brashears and President-Elect Sherman. Several interesting ideas were exchanged. The next TAPA meeting will be October 10-11, 2003, in Dallas.

The LAC Chair, Diane Sharer, advised LAD that the Bar reduced funding for various projects so it was not possible for all LAC members to attend their meeting in May and thus the meeting was cancelled.

State Bar College continues to accept members for the charter membership period. The State Bar College requested the opportunity to present its charter member certificates at the LAU 2003 Friday luncheon.

The Standing Rules were revised to allow the Board to discipline directors who fail to attend two duly noticed board meetings without excused absences during his/her term or follow through with the duties of a director.

The Publications Committee continued work on updating the LAD website. Some of the suggestions were to add a job bank for the members of LAD and to investigate the server options available for the website.

The LAC/LAD Joint Task Force developed a survey for LAD members to determine whether the term paralegal or legal assistant was preferred.

The Bar reviewed the contract presented by Mike De La Rosa regarding online CLE and made some suggested changes. The contract was sent back to Mr. De La Rosa for his review.

President-Elect Sherman was asked to compile a letter to District 9 to obtain opinions from those members regarding potential reorganization of their District.

The Board voted to present the Bylaws Amendments for vote to the membership through the LAD website.

The 2003 Annual Meeting was held in conjunction with the Bar's Annual Meeting at the Hyatt Regency Houston on June 12-14, 2003. The Division had 76 registered for the Annual Meeting Luncheon and was assisted by 47 vendors to sponsor the socials, door prizes, two continental breakfasts, and breaks.

On Friday, June 13, 2003, the Annual Meeting Luncheon was held at the Hyatt Regency Houston Hotel. Justice Eva Guzman as keynote speaker gave a wonder presentation regarding the importance of legal assistants in the legal field. Special guests included Houston area legal assistant associations, including ACLAA, HLLA, and HPLA.

Gloria Martin of Lubbock was presented with the Exceptional Pro Bono Award. Special Awards for Broadus Spivey, Past-President of the Bar, Mark Smith of TriVue, Kristine Farmer, and Carolyn Goff were announced. The Outstanding Committee Chair was Jennifer Fielder, Chair of the Elections Committee.

Legal Assistants Division Board of Directors 2002 - 2003

Officers:

President:	Rhonda J. Brashears, CLA, TBLS
President-Elect:	Melissa Sherman, CLA, TBLS
Treasurer:	Mary McDowell, CLA
Secretary:	Ellen Lockwood, CLAS, RP
Parliamentarian:	Carolyn Goff

Directors:

District 1	Melinda Jackson*
District 2	Kim Cantu, CLA
District 3	Pat Hammer, CLA
District 4	Pam Horn
District 5	Ellen Lockwood, CLAS, RP
District 6	Evyonne Palmer, CLAS

District 7	Carol McRoberts, CLA*
District 8	Karla Schwemmer, PLS, RP
District 9	Virginia Coronado, TBLS*
District 10	Sandy Eaves, CLAS, TBLS
District 11	Mary Dowell, CLA
District 12	Tamara Null, CLA
District 13	Carolyn Goff
District 14	Lynda Barron
District 15	Michelle P. Garcia
District 16	Mariann Porter, CLA

* Melinda Jackson resigned in February 2003. District 1 remained vacant the remainder of the fiscal year.

* Carol McRoberts resigned in June 2003. District 7 remained vacant the remainder of the fiscal year.

* Virginia Coronado resigned and District 9 remained vacant the remainder of the fiscal year.