

HISTORY OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS

2004 - 2005

The Incoming Board Meeting was held June 25-26, 2004, at the Emily Morgan Hotel in San Antonio. Committee Chairs and Advisors were appointed as follows:

STANDING COMMITTEE	CHAIR	BOARD ADVISOR
Annual Meeting	Lou Bugarin & Jackie Sandoval*	Joncilee Miller
	*Jackie Sandoval resigned and Stephanie Hawkes was appointed	
Continuing Education Committee	Pam Horn & Karen Briere	Ellen Lockwood
Elections	Jennifer Fielder	Robert Soliz
Long Range Planning Task Force	Debra Crosby	Kim Cantu
Membership	Charlene Carroll	Joncilee Miller
Publications	Rhonda Brashears	Page McCoy
Public Relations	Linda Studer	Patty Giuliano
Professional Development	Kristy Ritchie	Virginia Gil
Professional Ethics	Laurie Borski	Ellen Lockwood
AD HOC COMMITTEE	CHAIR	BOARD ADVISOR
NALS Certification	Page McCoy	Cel Wiginton
State Bar College	Rhonda Brashears	Joncilee Miller
LAD Ambassadors	Carolyn Goff	Ann Brusso-Webb
TBLS Exam	Javan Johnson	Kim Cantu
Procedures Manual	Ellen Lockwood	
Redistricting	Mariann Porter	Virginia Gil
TAPA Spring 2005 Meeting	Ellen Lockwood	
LAD 25th Anniversary	Michele Boerder	
LAD E-group Policies	Margaret McCormick	Ellen Lockwood
LAD Membership Renewal Audit	Michele Flowers Brooks	Pam Horn

The Directors will stop sending newsletters by mail, instead, they will be posted on the Division's website for members to access.

President Cantu introduced a new program, "LAD Ambassadors." This program waives LAD membership dues to LAD Past-Presidents who make themselves available and give presentations to local groups on behalf of LAD. The Board approved this program.

The Joint Task Force continued to work with the LAC to promote the terminology change from "legal assistant" to "paralegal" and to revise the definition.

Promotion of the "LAD Goes to London" project began at the Annual Meeting. This trip for LAD members and guests will take place April 24-30, 2005.

A presentation was made by three NALS representatives regarding NALS' new paralegal certification exam. NALS requested that the Division accept the PP designation as a criteria for Division membership. An ad hoc committee was appointed to review this exam and make a recommendation to the Board regarding the request.

HB 1769 was passed by the Texas Legislature and potentially required private investigator licensure by paralegals that perform certain tasks. The Division worked with the Bar General Counsel, Pat Moore, and a brief on behalf of the Division was submitted

to the Attorney General by Immediate Past-President Sherman and President Cantu on this issue. The AG eventually issued a favorable opinion exempting most paralegals from the licensure requirements, although some freelance paralegals may still be faced with this requirement.

LAU 2004 was held in Fort Worth on September 22-24, 2005, at the Doral Tesoro Hotel. The event was well attended and included a social at the Texas Motor Speedway, a hot air balloon, and over 65 hours of CLE offerings.

The Capital Area Paralegal Association hosted the fall meeting of the Texas Alliance of Paralegal Associations (TAPA) in Austin.

Texas Forum XXIII was held in Austin on October 8, 2004, with the Bar's Standing Committee on Legal Assistants, the Division, and Texas paralegal educators. The theme of the meeting was "Paralegal Profession: Issues and Opportunities." The LAC and LAD gave overviews of their history and current activities. The educators sponsored a presentation on the trends in nomenclature between "legal assistant" and "paralegal," issues facing short-term paralegal education programs, and paralegals as mediators. A panel presentation was given on "A Comparison of Internal Paralegal Utilization Structures and Hierarchies."

The fall meeting of the Board was held at the Crowne Plaza Hotel in Austin on October 8-9, 2005.

The Division enacted a policy to eliminate all mass faxes and emails to non-Division members based upon the CAN-SPAM Act.

The Division will have a bylaw election in the spring to change the name of the Division to the "Paralegal Division".

The Division entered into a contract with LegalSpan to offer online CLE.

The Board discussed ongoing plans for the 2005 Annual Meeting to be held in Dallas on June 23-24, 2005.

Director McCoy resigned as Chair of the NALS Ad Hoc Committee and Immediate Past President Sherman was appointed to take over.

The Ad Hoc Committee on E-group Policies reported to the Board. The Board is considering the appointment of a moderator to address e-group issues.

The ad hoc committee on the 25th Anniversary is working on promotional and advertising concepts for the Division's upcoming anniversary.

The Board discussed the Redistricting Committee's report and associated issues involving Districts 9 and 15.

Ann Bruso-Webb, CLA, resigned as District 13 Director.

The Division began offering reasonably priced online CLE. The first offerings include courses taped at LAU 2004. A discount is available to LAD members.

The spring meeting of the Board was held at the Omni Southpark Hotel in Austin on February 25-26, 2005. Bar General Counsel Patricia Moore attended the meeting as a special guest.

Deborah Hathaway was appointed Director for District 13 by the Board and will complete that term.

President Cantu announced that LAD members will be listed in the Texas Legal Directory, as will TBLS certified paralegals. The Bar also agreed to turn over the Division's membership database to the Division for management.

The Ad Hoc Committee on Redistricting recommended that District 9 be dissolved and absorbed into surrounding districts and that some other districts be reconfigured.

The Joint Task Force met with the Bar's Administration Committee on the proposed definition change. The Chair of the Administration Committee and General Counsel Moore suggest that the Task Force work with the Disciplinary Rules Revision Committee, chaired by Linda Eads of Dallas, on this issue. The Bar Board plans to consider the Division's name change and the revised "paralegal" definition at their April 2005 meeting. The Bar Board will take up the annotations to the definition at a later date.

President Cantu appointed an ad hoc committee on providing non-CLE events in each district with Ginger Williams, CLAS, serving as chair. Also appointed was an ad hoc committee to develop a 360-degree process for the Division to annually review the Coordinator's performance, chaired by Debbie House.

LAU has been renamed to the Texas Advanced Paralegal Seminar and it will be held September 21-23, 2005, at the Omni Hotel in Austin.

The Ad Hoc Membership Spot Audit Committee reported that the review process was successful and recommended that such a committee be in place for future renewals and that new member applications not be reviewed by this committee.

The Bar approved adding a LAD position on the State Bar College Board of Directors. The Division Board appointed President Cantu as LAD's first representative for a three-year term and established an ad hoc committee to determine the procedure for future appointments. Robert Soliz will chair this committee.

The Board approved the following 2004-2005 awards:

Award of Excellence — Pamela R. Horn
 Outstanding Committee Chair — Mariann Porter, CP
 Special Awards — Annual Meeting Co-Chair Plaques
 Patricia Moore — Outstanding Recognition and Appreciation
 Melissa Sherman — LAU 2004 Chair
 Certificates for LAU 2004 Planning Committee Members

The Board elected the following 2005-2006 officers:

Javan Johnson, CLAS, TBLS - President-Elect
 Cel Wiginton, CLA — Treasurer
 Mona Hart Chandler, CP — Secretary
 Debbie Skolaski, CP — Parliamentarian

In response to the recommendations of the Ad Hoc Committee on E-group Policies, the Board created a Sub-Committee under Publications to handle e-group policies on an ongoing basis.

The Board received the report and recommendations of the 2003 financial audit from Carrie Bradshaw, CPA, of Brown Graham & Co.

The Board adopted the recommendations of the NALS Certification Exam Review Ad Hoc Committee in determining that the PP exam does not meet LAD's qualifications for membership at this time.

Andrea Kinzy, CLA, resigned as District 6 Director.

On April 8, 2005, the Board of the Bar approved a name change from the Legal Assistants Division to the Paralegal Division based upon the results of a bylaw election by the LAD membership. They also adopted a definition change as follows:

Definition of a Paralegal:

A paralegal is a person, qualified through education, training, or work experience, who is employed or retained by a lawyer, law office, governmental agency, or other entity in a capacity or function which involves the performance, under the ultimate direction and supervision of an attorney, of specifically delegated substantive legal work, which work, for the most part, requires a sufficient knowledge of legal concepts that, absent such assistant, the attorney would perform the task.

The Division hosted the spring TAPA meeting on April 15-16, 2005, in Austin. Friday's activities featured "A Day at the Capitol" including a tour, lunch, and presentations by various state officials including Justice Priscilla Owen. The day concluded with the presentation of House Resolution No. 865 declaring October 23, 2005, as Paralegal Day. The Division presented each attendee with an aluminum luggage tag featuring a stylized drawing of the Capitol's dome and reference to the Division's 25th Anniversary. The business meeting on Saturday featured great exchanges of information and ideas between associations.

A group of 35 participated in "LAD Goes to London" on April 24-30, 2005. In addition to mainstream tourist destinations, the group was able to observe the English legal system and governmental structures first hand.

The Annual Meeting was held at the Wyndham Anatole, Dallas, on Friday, June 24, 2005. The theme of the 2005 Annual Meeting was "There's No Place Like the Division" and Michele Boerder, Chair, 25th Anniversary Ad Hoc Committee, narrated a skit with members of Division, based on the Wizard of Oz theme, and outlining highlights of the 25-year history of the Division:

- What's in a Name? — Joncilee Miller and Stephanie Hawkes explained the Division's name change
- Board Certification, Texas Board of Legal Specialization — Joncilee Miller and Lou Bugarin presented TBLS certification process for paralegals
- Paralegal Day, October 23 — Stephanie Hawkes spoke on the Legislative Resolution declaring October 23 as Texas Paralegal Day

National awards had been received during 2005 by members of the Division, and these individuals were recognized:

- S. Kristine Farmer, Past President of Division
 Awarded Legal Assistant Today's 2005 Paralegal of the Year
- Michele Boerder, Past President of Division
 Awarded NFPA's 2005 Paralegal of the Year

- Lou Bugarin
NFFPA 2005 Local Outstanding Leader Award

The 2004-2005 Division awards were presented to:

- Martha Jones, Austin
Exceptional Pro Bono Service Award
- Pamela R. Horn, District 4 Director and Division Secretary, Austin
Award of Excellence
Presented for her initiation and set up of Division's online CLE
- Mariann Porter, CLA, El Paso
Award for Committee Chair of the Year
Presented for her work on Statewide Redistricting; absorption of District 9
- Patricia Moore, SBOT General Counsel, Austin
Special Award
- Melissa Sherman, CLA, Fort Worth
2003-2004 LAD President
Special Award — LAU Planning Committee

Legal Assistants Division Board of Directors 2004 - 2005

Officers:

President:	Kim J. Cantu, CLA
President-Elect:	Ellen Lockwood, CLAS, RP
Treasurer:	Pam Horn, TBLS
Secretary:	Cecile Wiginton, CLA
Parliamentarian:	Debbie Skolaski, CLA

Directors:

District 1	Debbie Skolaski, CLA
District 2	Joncilee, Miller, CLA
District 3	Debbie House, CLA
District 4	Pam Horn, TBLS
District 5	Patricia J. Giuliano
District 6	Andrea Kinzy, CLA*
District 7	Page L. McCoy, PLS, CLA
District 8	Robert W. Soliz
District 9	Vacant
District 10	Ginger D. Williams, CLAS, TBLS
District 11	Cecile Wiginton, CLA
District 12	Lisa Bowles
District 13	Ann Bruso-Webb, CLA**
District 14	Mona Hart Chandler, CLA
District 15	Virginia Gill, TBLS
District 16	Heidi Beginski, TBLS

*Andrea Kinzy resigned in April 2005.

**Ann Bruso-Webb resigned and Deborah Hathaway was appointed by the Board to serve the remainder of her term.