

HISTORY OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS 2007 - 2008

The 2006-2007 Outgoing Board of Directors met June 21, 2007 at the Emily Morgan Hotel in San Antonio, Texas.

President Johnson reported that for the first time the PD members would be able to access their MCLE hours on file with the State Bar of Texas (SBOT) through the PD website. After a meeting with the SBOT MCLE department, Executive Director, and technical department, the SBOT agreed to forward the PD member's MCLE records each week so that the PD Coordinator can upload them to the PD website. Each PD member can go onto the website and access their record, add other CLE hours, and in general maintain an electronic CLE folder from the Members Only section of the PD website. This had been an ongoing problem for many years, and a member benefit that was very important to the PD members.

The previous Legal Assistants' Day House Bill was deemed obsolete since the Texas Paralegal Standards had been adopted by the SBOT Board of Directors in 2005, and the Division's name changed, so PD worked with Representative Brian Hughes to sponsor House Resolution 2813 which was passed and set forth October 23, 2007 and October 23, 2008 as Paralegal Day in the State of Texas.

A new "brand" was developed for the Texas Paralegal Standards for marketing and publication purposes.

Discussion was held regarding filming an updated version of "Profiling the Paralegal Profession" video. President Johnson worked with Lisa Sprinkle to develop the cost and details for creating a new video.

The PD Ambassadors were responsible for 24 Ambassador presentations across the state during the fiscal year.

Paralegal Division Board of Directors 2006-2007

Officers:

POSITION	OFFICER
President	Javan Johnson, ACP, TBLS
President-Elect	Patricia J. Giuliano
Secretary	Mona Hart Chandler, CP
Treasurer	Deborah Hathaway
Parliamentarian	Robert W. Soliz

Directors:

DISTRICT	DIRECTOR
District 1	Debbie Skolaski, CP
District 2	Stephanie Hawkes, RP
District 3	Debbie House, CP
District 4	Billy Hart
District 5	Kristy Ritchie
District 6	Deirdre Trotter, CLAS
District 7	Page L. McCoy, PLS, CLA
District 8	Robert W. Soliz
District 10	Ginger D. Williams, CLAS, TBLS*
District 11	Cecile Wiginton, CLA

District 12	Debbie Oaks Guerra
District 13	Deborah Hathaway
District 14	Mona Hart Chandler, CP
District 15	Virginia Gill, TBLS
District 16	Clara Buckland, CP

*Ginger Williams resigned in November 2006. Cheryl Bryan, CP of Beaumont, was appointed to fill her position for the remainder of her term.

2007-2008

The 2007 Annual Meeting of the Paralegal Division was held at the Henry Gonzales Conference Center in San Antonio, Texas on June 22, 2007 at 9:00 a.m. Because of a different format for the State Bar of Texas (SBOT) Annual Meeting, with a joint luncheon between the SBOT and its sections, the PD did not hold the traditional annual meeting luncheon, but instead attended the joint luncheon with the SBOT.

The treasurer announced that the PD had \$175,000 in retained earnings and was sound. PD members' MCLE records are now housed on the PD website for members to access. Six PD members wrote a *Paralegal Ethics Handbook* published by West Publishing to be available for sale in the Fall. It was announced that the next PD annual trip would be to Ireland in April 2008.

The following awards were presented:

AWARD	RECIPIENT
Exceptional Pro Bono Award	Jena Parker, CP
Outstanding Committee Chairs	Rhonda Brashears, CP, Publications Cel Wiginton, CP, Continuing Education – Online CLE
Special Awards	Ellen Lockwood, ACP, RP and Javan Johnson, ACP For their work on the Paralegal Division's 25 th Anniversary Celebration at the Texas Advanced Paralegal Seminar in September 2006
Outgoing Director Plaques	Debbie Skolaski, CP, District 1 (two terms) Debbie House, CP, District 3 Page McCoy, District 7 Ginger Williams Gage, ACP, District 10 Cel Wiginton, CP, District 11 (two terms) Virginia Gil, District 15

Other general PD business was conducted and the annual report of the President was given, followed by the installation of the 2008 Officers and Board of Directors.

The Incoming Board of Directors met on June 22-23, 2007 at the Emily Morgan Hotel in San Antonio, Texas. President Giuliano discussed her goals to focus on the public service portion of PD's mission statement and have PD more involved in pro bono work. The theme for the year was adopted: *A Division With a Vision.* President Giuliano's plans included teaming with SBOT to match attorneys with paralegals for working on Pro Bono projects.

Committee Chairs/Board Advisors appointed were:

Committee	Chair	Advisor
Annual Meeting	Jennifer Barnes Vanetta Murphee	Charie Turner, CP
Continuing Education	Nan Gibson, District CLE Cel Wiginton, CP, OnLine CLE	Kim Hennessey, CP
Elections	Melanie Langford	Robert Soliz
Membership	Ginger Williams, ACP	Mona Chandler, CP
Professional Development	Sharon Taylor	Billy Hart
Professional Ethics	Ellen Lockwood, RP, ACP	Rhonda Brashears, CP
Public Relations	Jodye Kasher, ACP	Kristy Ritchie
Publications	Heidi Beginski	Rhonda Brashears, CP

Liaison appointments were as follows:

Organization	Liaison
American Alliance of Paralegals	Stephanie Hawkes, RP
American Association of Legal Nurse Consultants	Deirdre Trotter, CLA
American Association for Paralegal Education	Kim Hennessey, CP
American Bar Association/Paralegals	Robert Soliz
Association of Legal Administrators	Kristy Ritchie
College of the State Bar of Texas	Robert Soliz
International Paralegal Management Association	Billy Hart
National Association of Legal Assistants	Clara Buckland, CP
National Federation of Paralegal Associations	Stephanie Hawkes, RP
Paralegal Committee of the SBOT	Patti Giuliano
Texas Alliance of Paralegal Associations	Patti Giuliano
Texas Association of Legal Professionals	Michele Rayburn, CP
Texas Board of Legal Specialization	Cheryl Bryan, CP
Texas Institute for Specialty Certification	Cheryl Bryan, CP
Texas Young Lawyers Association	Misti Janes

Further discussion was held regarding the Professional Development Committee being involved in the pro bono projects for the year. A report was given on the status of membership renewals.

President Giuliano appointed the following ad hoc committees:

Committee	Chair	Advisor
Alliance of State Paralegal Organizations	Javan Johnson, ACP	Stephanie Hawkes, RP
Ambassador Program	Carolyn Goff	Deborah Hathaway
Attorney Marketing	Ellen Lockwood, RP, ACP	Kristy Ritchie
E-Group Policy	Heidi Beginski	Deirdre Trotter, CLAS
Ethics Handbook	Ellen Lockwood, RP, ACP	Rhonda Brashears, CP
Membership Renewals/Spot Audit	Michelle Flowers Brooks Jeanette Ybarra	Billy Hart
State Bar College Membership Applications	Jena Parker	Robert Soliz
Vendor Liaison	Debbie Oaks Guerra	No board advisor appointed*
Procedures Manual	Stephanie Hawkes, RP	No board advisor appointed*
Mandatory CLE	Debbie Oaks Guerra	No board advisor appointed*
Annual Meeting	Rhonda Brashears, CP	No board advisor appointed*
PD Coordinator Review	Rhonda Brashears, CP	No board advisor appointed*
Redistricting	Stephanie Hawkes, RP	No board advisor appointed*

*no board advisors appointed since appointed chairs were members of the board.

Discussion was held as to whether the Ambassador Program Ad Hoc Committee should be made a standing committee. It was determined that this may be presented to a future board for discussion.

Discussion was held regarding the Vendor Liaison ad hoc committee being charged with finding a vendor sponsor to assist in paying for the “paralegal” tab in the Texas Legal Directory for the paralegal section. The Board decided not to solicit advertising for the Texas Legal Directory.

Discussion was held regarding E-Group job postings guidelines to prevent “serial postings” or “recruiter” postings to protect personal interests of the members, and to keep the postings official.

The mentor pilot program in District 5 under the Public Relations Committee was discussed. The Chair requested it to be rolled out to all districts and to work with each district PR committee member to try the program in each district and it would be mandatory for each Director to be a mentor.

The Vendor Liaison Ad Hoc Committee was formed to increase sustaining/vendor memberships and discussion was held regarding charges to encourage and increase membership.

2007 TAPS was held in Dallas at the Crowne Plaza Hotel on October 3-5, 2007 with the theme “It’s a Perfect Score! TAPS 2007 – CLE and More!”. There was record attendance of almost 300 attendees, and it was a huge success overall. The offsite social was held at 300 Dallas, and the keynote speaker at the Friday luncheon was Jay Downs with Downs Stanford, P.C., Dallas, Texas presenting the topic *Ethics for People and Paralegals, Too!*

The *Paralegal Ethics Handbook* was introduced at TAPS 2007 and the authors that were in attendance autographed books for the attendees that purchased them.

The Winter Board of Directors meeting was held at the Crowne Plaza Hotel in Austin, Texas, November 9-11, 2007.

The *Profiling the Paralegal Profession* video, produced by the PD, was taped on October 18, 2007 and was being finalized by the media team. PD will apply for MCLE accreditation for viewing the video by attorneys.

The Texas Forum XXV was held on November 9, 2007 in Austin, TX at the Hilton Garden Inn Hotel and was primarily a panel discussion. No Texas Forum is scheduled for 2008. The next scheduled Texas Forum will be held in the Spring 2009.

Twenty-nine persons were registered for the spring trip to Ireland scheduled for April 26th to May 1st, 2008.

Celebrations were held throughout the state for Texas Paralegal Day in October.

New Board Advisors were appointed as follows:

Committee	Advisor
Elections	Rhonda Brashears, CP
Procedures Manual	Stephanie Hawkes, RP
Public Relations	Debbie Guerra
Attorney Marketing Ad Hoc	Debbie Guerra

New Liaisons were appointed as follows:

Organization	Liaison
American Bar Association/Paralegals	Misti Janes
College of the State Bar of Texas	Charie Turner, CP
Public Relations Application Review Ad Hoc	Rhonda Brashears, CP
Association of Legal Administrators	Clara Buckland, CP

President Giuliano commended two directors for outstanding performance since the incoming board meeting: Debbie Guerra and Charie Turner, CP.

The Ethics Handbook Ad Hoc committee reported that the reprints were being handled. ThompsonWest sponsored a CLE series to market the handbook – December 6 in Dallas, December 11 in Austin, and December 12 in Houston. Former Presidents Ellen Lockwood and Javan Johnson, and also co-authors of the book, were presenters at the CLE seminars.

The Membership Committee reported that emails were sent to all non-members of PD that purchased on-line CLE, as a marketing tool.

President Giuliano’s focus being pro bono projects, encouraged the Board to be more involved in their districts, and stated that Texas Supreme Court Access to Justice Task Force is very important in these projects.

A survey was conducted in Districts 4, 10, 13 and 15 regarding the potential for redistricting those districts for better representation, however there was a very low response to the survey so no recommendations for redistricting were made.

A new ad hoc committee was appointed by President Giuliano to review disclaimer issues regarding the TPJ, advertising, and TAPS exhibitors.

The Ambassador Program procedures were amended to allow a limitation to one Ambassador per event requested, and only one Ambassador event be allowed per year for each local association, unless the requesting organization participates in the expenses involving the Ambassador's travel and participation.

The Spring 2008 Board of Directors meeting was held at the Airport Hilton Hotel in San Antonio, Texas on February 22-23, 2008.

TAPS 2008 will be held in San Antonio and will be the 10th Anniversary of TAPS.

The Directors reports included many successful pro bono and CLE events that had been held throughout the state since the June annual meeting. The Directors continue to be charged with having CLE events in their districts for at least three hours of CLE credit for their members.

The Executive Committee considered whether to apply for a credit card, and declined to do so, however the PD will purchase credit card software which will allow TAPS registrations to be purchased online.

A discussion was held regarding membership renewal delinquencies and the date which late fees must be paid. An amendment was made to that date, and President Giuliano appointed an ad hoc committee to address delinquent membership renewals. The Standing Rules of the Paralegal Division will be updated to include the dates approved by the Board of Directors.

An application for sustaining membership was made by a group that administers and certifies paralegal exams. The Board felt it may cause confusion with the goals of the Division, as well as the Division's long time support of the Texas Board of Legal Specialization examination, so the application was denied at this juncture. However, President Giuliano appointed an ad hoc committee to review the application and the sustaining membership criteria.

A contest was held among the directors to rename the PD Bulletin, and the winning name was Paralegal Division QuickNotes (PDQ), submitted by Director Hathaway.

The Board voted to contract with a PD vendor to begin the process of scanning the PD minutes since its inception, for preservation purposes.

2007-2008 Outgoing Board Meeting - June 2008

The outgoing Board of Directors meeting was held Thursday June 26, 2008 at the Crowne Plaza Hotel in Houston, Texas.

President Giuliano announced that she attended the State Bar of Texas Council of Chairs meeting, and President Giuliano and President-Elect Brashears attended the annual 2008 Texas Alliance of Paralegal Associations meeting in Fort Worth, TX hosted by the Forth Worth Paralegal Association (FWPA).

The annual PD trip to Ireland in the Spring 2008 was a "blast," and "breathtaking." All travelers enjoyed visiting Killarney and Dublin with trips to the Ring of Kerry and many castles. In Dublin, the group visited Trinity College to view the Book of Kells and attended a CLE held at the Four Courts presented by a Barrister followed by a visit to a criminal court session.

The *Profiling the Paralegal Profession* video was completed and was passed out to attorneys at the PD booth in the exhibit hall at 2008 State Bar of Texas Annual Mmeeting. One-half hour of eligible MCLE credit was obtained for those that view the video.

The TPJ will add a new section entitled *A Division with Vision... Paralegals Making a Difference*.

The Ethics Handbook was first published in August 2007, and revisions were submitted to the publisher in May 2008. Royalties are being paid to the Division by ThompsonWest from the sale of the handbook.

Paralegal Division Board of Directors 2007-2008

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Treasurer	Stephanie Hawkes, RP
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Directors:

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District 2	Stephanie Hawkes, RP
District 3	Michele Rayburn, PLS, CP
District 4	Michele Flowers Brooks*
District 5	Susan Wilen*
District 6	Deirdre Trotter, CLAS
District 7	Misti Janes
District 8	Robert Soliz
District 10	Cheryl Bryan, CP
District 11	Kim Hennessy, CP
District 12	Debbie Oaks Guerra
District 13	Deborah Hathaway
District 14	Mona Hart Chandler, CP
District 15	Vacant
District 16	Clara Buckland, CP

*Billy Hart resigned in the Winter of 2007 and Michele Flowers Brooks was appointed to fill the remainder of his term.

*Kristy Ritchie resigned in November 2007 and Susan Wilen was appointed to fill the remainder of her term.