

# PARALEGAL DIVISION

STATE BAR OF TEXAS



Clara Luna Buckland, C.P.  
2014 – 2015 President  
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## HISTORIAN REPORT 2014-2015

### 2014 Annual Meeting

The 2014 Annual Meeting of the Paralegal Division entitled, *The Paralegal Express: Your Train to Success* was held in Fort Worth on June 27, 2013-2014 President Misti Janes, TBLS-BCP, presided. The keynote speaker was Lyn Robbins, Senior General Attorney for BNSF Railway Company who spoke on what he, as in-house counsel, looks for in outside counsel paralegals.

President Janes recognized the members of the 2014 Annual Committee specifically, Janice Piggott, Julie Sherman, Star Moore and Katrina Lea. President Janes also presented plaques to the outgoing directors in even numbered districts, specifically, District 2 (Dallas) Mariela Cawthon, TBLS-BCP, District 4 (Austin) Kristina Kennedy, TBLS-BCP, District 12 (Denton) Pamela Snavelly, ACP, and District 16 (El Paso) Linda Gonzales, CP, as a token of appreciation for their service on the Board of Directors of the Paralegal Division. Ms. Susan Wilen, R.N., was recognized and presented with the Exceptional Pro Bono award, as well as the PD's Outstanding Committee Chair Award for her service as Chair of 2012 and 2013 TAPS Planning Committees. Ms. Javan Johnson, TBLS-BCP, received the Special Recognition Award for her outstanding service as Chair of the TBLS Helpful Hints Guide.

President Janes installed the 2014-2015 Board of Directors as set out below.

Officers:

President:	Clara Luna Buckland, CP
President-Elect:	Erica Anderson, ACP
Secretary	Michelle Beecher
Treasurer	Mona Hart-Tucker, CP
Parliamentarian	Megan Goor, TBLS-BCP

Directors:

District 1	Christine R. Cook
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## 2014-2015 PD History

District 2	Jay Williams, TBLS-BCP
District 3	Megan Goor, TBLS-BCP
District 4	Stephanie Sterling
District 5	Allison C. Seifert
District 6	Deirdre Trotter, ACP* Georgia M. Seeley, ACP
District 7	Marsha Smith, CP
District 8	[vacant] Lori Wilkinson, PLS **
District 10	Sharon Wornick, CP
District 11	Lydia McBrayer, CP*** Janet McDaniel, CP
District 12	Michelle Beecher
District 14	Mona Hart Tucker, ACP
District 15	Martha Ramirez, TBLS-BCP
District 16	Olga Burkett

\*Director Trotter resigned in June 2014. Georgia Seeley was appointed to fill the directorship for the remainder of the term.

\*\* In February 2015, Director Wilkinson was appointed to fill the vacancy in District 8.

\*\*\* Director McBrayer resigned in the fall of 2014. Janet McDaniel was appointed to fill the directorship for the remainder of the term.

### **2014 Incoming Board Meeting**

The Incoming Board Meeting was held on June 12, 2014 in Dallas. President Buckland shared her goals for the year, specifically, to concentrate on empowering paralegals, and appointed the following to serve in conjunction with the 2014-2015 Board.

#### Committee Chairs/Board Advisors:

<b>Committee</b>	<b>Chair</b>	<b>Advisor</b>
Annual Meeting	Ellen Lockwood, ACP, RP	Allison Seifert
Bylaws & Standing Rules	Megan Goor	n/a
Continuing Education District CLE	Sheila Milbrandt, CP	Mona Hart Tucker, ACP
Online CLE	Rhonda Brashears, CP	Marsha Smith, CP
Elections	Shandi Howard, CP	Sharon Wornick, CP
Membership	Tonya Brothers	Olga Burkett
Procedures Manual	Erica Anderson, ACP	n/a
Professional Development	Deborah Andreacchi, TBLS-BCP	Jay Williams, BCP-BCP
Professional Ethics	Ellen Lockwood, ACP, RP	Christine Cook
Public Relations	Joncilee Davis, ACP	Michelle Beecher
Publications	Heidi Beginski, TBLS	Mona Hart-Tucker, ACP

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2014-2015 PD History

Ad Hoc Committee Chairs/Board Advisors:

<b>Committee</b>	<b>Chair</b>	<b>Advisor</b>
Ambassador Program Ad Hoc Committee	Patti Giuliano	Allison Seifert
E-Group Policy Ad Hoc Committee	Heidi Beginski, TBLS	Mona Hart-Tucker, ACP
Ethics Handbook Ad Hoc Committee	Ellen Lockwood, ACP, RP	Christine Cook
Leadership Development *	Michele Boerder, TBLS-BCP	Allison Seifert
Membership Renewals/Spot Audit Ad Hoc Committee	Lori Winter, CP	Stephanie Sterling
Pro Bono Ad Hoc Committee	Connie Nims	Megan Goor, TBLS-BCP
State Bar College Membership Application Review Ad Hoc Committee	Michele Flowers Brooks, CP	Mona Hart Tucker, ACP
e-Newsletter (co-chairs)	Gabriela Warner Sheila Posey, TBLS-BCP	Stephanie Sterling
TAPS 2014 Planning Committee	Misti Janes, TBLS-BCP	Clara Luna Buckland, CP
TAPS 2015 Planning Committee	Clara Luna Buckland, CP	Erica Anderson, ACP
TBLS Exam Helpful Hints Guide	Javan Johnson, TBLS-BCP	Martha Ramirez, TBLS-BCP
Vendor Liaison Ad Hoc Committee (co-chairs)	Mr. Shannon Shaw, CP Iris Becker La'Shundra Tucker	Jay Williams, TBLS-BCP

\*This committee was dismantled in the spring of 2015 for lack of participation.

Liaison appointments:

<b>Organization</b>	<b>Liaison</b>
American Alliance of Paralegals (AAPI)	Allison Seifert
American Association of Legal Nurse Consultants (AALNC)	Christine Cook
American Association for Paralegal Education (AAfPE)	Janet McDaniel, CP
American Bar Association/Paralegal	Jay Williams, TBLS-BCP
Association of Legal Administrators	Sharon Wornick, CP
International Paralegal Management Association (IMPA)	Marsha Smith, CP
National Association of Legal Assistants (NALA)	Stephanie Sterling
National Federation of Paralegal Associations (NFPA)	Jay Williams, TBLS-BCP
Paralegal Committee of the State Bar (PC)	Clara Buckland, PC

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Texas Alliance of Paralegal Associations	Clara Buckland, PC
Texas Association of Legal Professionals (TALP/NALS)	Martha Ramirez, TBLS-BCP
Texas Lawyers for Texas Veterans	Mona Hart-Tucker, ACP
Texas Board of Legal Specialization (TBLS)	Olga Burkett
Texas Young Lawyers Association (TYLA)	Megan Goor, TBLS-BCP

### TAPS 2014

The Division’s three day, multi-track CLE seminar, Texas Advanced Paralegal Seminar, TAPS 2014: The Beat Goes On! was held in Austin October 1 through October 3. It was a big success with over 260 paralegals attending. The PD enjoyed tremendous vendors’ and exhibitors’ support, with many door prizes given to attendees. And for the first time, the PD rolled out its new TAPS app which allowed attendees to keep track of the event schedule, to include CLE sessions, socials, and a directory of attendees. The app also included the Click game, a photo scavenger hunt which allowed attendees to engage one another. The event was capped with the Friday attendees luncheon with keynote speaker, Thomas Watkins on *Dance with the One who Brung You*, an insightful presentation on the paralegal profession. The first two players of the app Click game to correctly submit their photos for points won a prize. The TAPS 2014 Scholarship winners, Olga Burkett (El Paso) and Christianna Yarbrough (Fort Worth) were recognized. To end the luncheon the names of the four lucky grand prize winners of \$500 a cash prize were drawn, specifically Patricia Simecek (Temple), Susan Davis (Fort Worth), Penny Keller (Austin) and Robin Swattes (Houston).

### Salary and Compensation Survey

The Division’s salary survey of all Texas paralegals regardless of member status was conducted August 1, 2014, through September 15, 2014.

### Winter Board of Directors Meeting

After District 13 was dismantled and its members integrated into District 1, President Buckland felt that District 1 had grown exponentially and questioned whether all the members in that district would be represented. After discussing the matter with District 1 Director Cook, the matter was placed on the agenda, and the board voted to create an additional seat within District 1. Per the standing rules, it was announced that the two District 1 directorships, Seat One and Seat Two would be filled during the election to be held at the same time as elections of Directors in odd numbered districts for the following fiscal year.

**SBOT Executives - PD Members.** In mid-September, Tracy Nuckols, SBOT Sections Manager, requested and on October 25, the Board voted in favor of extending complimentary PD memberships to several executives, support staff, and board advisors. The Board viewed this as a positive in that these individuals will receive all PD related emails, the eNewsletter, and the TPJ and they will see for themselves all the great work of the PD’s volunteers and the benefits of membership.

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### **TAPS 2015 Planning Committee Meeting**

The first meeting of the TAPS 2015 Planning Committee was held on January 23 and 24, at the Sheraton in Fort Worth. The committee officially voted to title the seminar, *Saddle Up for CLE*. President Buckland chaired the committee and appointed the following individuals who agreed to serve on the committee:

Erica Anderson, ACP - Board Advisor  
Patti Giuliano and Rhonda Brashears, CP – Co-Chairs, Vendors  
Rhonda Brashears, CP - Chair, Online CLE  
Misti Janes, TBLS-BCP, Chair, Conference App  
Star Moore and Julie Sherman, Co-Chairs, Speakers  
Pam Snavely and Sunnie Palmer, Co-Chairs, Socials  
Megan Goor, TBLS-BCP, Chair, Marketing  
Katrina Lea and Ginger Smith, Co-Chairs, Door Prizes  
Susan Wilen, RN, Chair, Registration  
Norma Hackler, CMP, Meeting Planner  
Public Members: Frank Hinnant, Innovative Legal Solutions  
Melissa Spivey, Esquire Deposition Solutions  
Dean Shaw, Kim Tindall & Associates

### **Texas Forum 2015**

The 33<sup>rd</sup> Annual Texas Forum was held on February 27, 2015 at the Cityplace Conference Center, Dallas, Texas with the theme “*Ethics in the Lone Star State: Supervisory Responsibilities of Legal Counsel.*”

### **MCLE Efforts**

President Buckland continued to work on the PD’s efforts that the SBOT MCLE Rules and Regulations be revised to allow teaching credit to attorneys who present substantive continuing legal education to paralegals. Ms. Tina Green, SBOT Board Member and Board Advisor to the Paralegal Division, directed President Buckland to submit the PD’s position on the matter to Trey Bergman, Chair of the Ad Hoc Committee looking into this request. On January 14, President Buckland wrote Mr. Bergman, and in response, was invited to attend the MCLE Committee meeting to present the request personally and answer any questions of the committee members. President Buckland attended the February 5 meeting. At the conclusion, the committee said they wanted a PD member to serve on the SBOT’s MCLE Ad Hoc Committee. In the Spring of 2015, SBOT President DuBois appointed Susan Wilen, RN of San Antonio, to the MCLE Committee as a public member.

### **TAPA 2015**

The Texas Alliance of Paralegal Associations (“TAPA”) 2015 Leadership Conference was hosted by the Denton County Paralegal Association, and entitled, “TAPA 2015: Finding Your True North.” The conference was held at the Courtyard Marriott, in Denton, April 10 and 11,

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2015. Both President Buckland and President-Elect Anderson attended, and reported on PD business.

### **PD Trip**

In April 2015, 24 people traveled with the Paralegal Division to Provence, France. The trip included touring the Palais des Papes (Pope's Palace) home of the Sovereign Pontiffs in the 14<sup>th</sup> century, a wonderful cooking class with a French chef, wine tasting, tour of the Pont du Gard, Saint Rémy, the birthplace of Nostradamus, and Arles where travelers toured the amphitheater and the Roman arena (coliseum). They also visited Aix-en-Provence on a market day; walked the Promenade de Anglais in Nice, and witnessed the changing of the guard at the Prince's Palace, of the Grimaldi family of Monaco, just to name a few.

### **PD Coordinator**

On April 13, after 25 years of service to the PD, Ms. Norma Hackler, PD Coordinator, submitted her letter of intent to retire, with 2015-2016 being her year of transition. Norma has been a key player, and instrumental in the success and growth of the PD, and we are grateful for her contributions, her commitment to the PD, each one of us, and the paralegal profession all these years. A PD Coordinator Search Ad Hoc Committee was created, and worked with Norma through the transition.

### **Membership**

The PD had approximately 1,795 members! This number represents the largest member base since 2003 when it was 1,882!

### **Board of Directors**

All PD members were represented on the Board of Directors as there were no vacant directorships!

### **Annual Meeting**

The 2015 Annual Meeting of the Paralegal Division was held in San Antonio at the Marriott Plaza Hotel on June 19. 2014-2015 President Clara Luna Buckland, CP, presided. The keynote speaker was Michelle Garza with the Refugee and Immigrant Center for Education and Legal Services ("RAICES") who presented on *Helping Attorneys to Help Others: How you can Make Pro Bono Work*. Her presentation focused on the work of RAICES which assists immigrants held in detention centers and volunteer opportunities.

President Buckland recognized the members of the 2015 Annual Committee specifically, Ellen Lockwood, Patti Giuliano, and Susan Wilen, as well as the 2014-2015 Board of Directors, and the various committees' volunteers. By motions duly made, seconded and voted upon, the readings of the Rules of Order and the minutes of the 2013-2015 Annual Meeting were waived. Thereafter, President Buckland presented the State of the Paralegal Division address. President Buckland presented the Exceptional Pro Bono Service Award to Allen Mihecoby, ACP, RP

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(Dallas). Thereafter, President Buckland presented the Division's Award of Excellence to Patti Giuliano, (San Antonio) and the Outstanding Committee Chair Awards to the PD's eNewsletter Co-Chairs Sheila Posey, TBLS-BCP (Conroe) and Gabriela Warner (Spring), and finally to Heidi Beginski, TBLS-BCP, (El Paso) Chair of the Publications Committee. Plaques expressing appreciation for their service were presented to the outgoing directors in odd numbered districts, specifically to District 1 Director Christine Cook (Houston), District 5 Director, Allison C. Seifert (San Antonio), and District 15 Director, Martha C. Ramirez, TBLS-BCP (McAllen).

President Buckland administered the Oath of Office and installed the 2015-2016 Board of Directors as set out below.

### Officers:

President:	Erica Anderson ACP
President-Elect:	Megan Goor, TBLS-BCP
Secretary	Michelle Beecher
Treasurer	Jay Williams, TBLS-BCP
Parliamentarian	Stephanie Sterling

### Directors:

District 1	
Seat One	Holly Huckabee, TBLS-BCP
Seat Two	Linda Carrette, TBLS-BCP
District 2	Jay Williams, TBLS-BCP
District 3	Mary Wintermote
District 4	Stephanie Sterling
District 5	Susan Wilen, RN
District 6	Georgia M. Seeley, ACP
District 7	Marsha Smith, CP
District 8	[absent] Lori Wilkinson, PLS
District 10	Sharon Wornick, CP
District 11	Janet McDaniel, CP
District 12	Michelle Beecher
District 14	Mona Hart Tucker, ACP
District 15	Edna Garza, TBLS-BCP
District 16	[absent] Olga Burkett

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