

PARALEGAL DIVISION

STATE BAR OF TEXAS



Erica Anderson, ACP
NALA Advanced Certified Paralegal
2015 – 2016 President
2016 – 2017 Historian
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HISTORIAN'S REPORT FOR 2015-2016

The 2015-2016 year saw many changes, with many of them behind the scenes and unknown to most members. With membership at approximately 1,715, the Division's 34th year brought anticipation of the approaching anniversary of 35 years.

2015 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 Meeting Committee specifically, Ellen Lockwood, CP, RP, Patti Giuliano, and Susan Wilen, R.N., 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 2014 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 (Dallas). Thereafter, President Buckland presented the Division's Award of Excellence to Patti Giuliano, (San Antonio) and the Outstanding Committee Chair Awards to the Division'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.

The purpose of the Division shall be to enhance paralegals' participation in the administration of justice, professional responsibility and public service in cooperation with the State Bar of Texas.

2015-2016 Division History

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 | Holly Huckabee, TBLS-BCP Linda Carrette |
| District 2 | Jay Williams, TBLS-BCP |
| District 3 | Mary Wintermote |
| District 4 | Stephanie Sterling |
| District 5 | Susan Wilen, R.N. |
| District 6 | Georgia M. Seeley, ACP |
| District 7 | Marsha Smith, CP ¹ Shandi Howard, CP |
| District 8 | Lori Wilkinson ² |
| 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 | Olga Burkett |

2015 Incoming Board Meeting

The Incoming Board Meeting was held on June 20, 2015 in San Antonio at the Marriott Plaza Hotel. President Anderson shared her goals for the year, specifically, an overall theme of "giving back" to the community and each other, and to also concentrate on the transition of Coordinators while moving forward in streamlining processes and coordination of volunteer tasks, mainly behind the scene. The following were appointed to serve in conjunction with the 2015-2016 Board.

Committee Chairs/Board Advisors:

| Committee | Chair | Advisor |
|------------------|-----------------|-----------------|
| Annual Meeting | Katrina Lea, CP | Mary Wintermote |

¹ Ms. Smith moved into a different district, and Ms. Howard was appointed to finish the year as District 7 Director.

² Ms. Wilkinson resigned immediately upon being sworn in, and Directorship of District 8 remained vacant.

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| Bylaws & Standing Rules | Stephanie Sterling | n/a |
| Continuing Education District CLE | Pamela Snavely, ACP | Stephanie Sterling |
| Online CLE | Rhonda Brashears, CP | Stephanie Sterling |
| Elections | Shandi Howard, CP | Sharon Wornick, CP |
| Membership | Pamela Etie | Olga Burkett |
| Procedures Manual | Megan Goor, TBLS-BCP | n/a |
| Professional Development | Deborah Andreatchi, TBLS-BCP | Georgia Seeley, CP |
| Professional Ethics | Ellen Lockwood, ACP, RP | Jan McDaniel, CP |
| Public Relations | Christine Cook, CP | Stephanie Sterling |
| Publications | Heidi Beginski, TBLS-BCP Kim McDonald | Mona Hart-Tucker, ACP |

Ad Hoc Committee Chairs/Board Advisors:

| Committee | Chair | Advisor |
|--|--|--------------------------|
| Ambassador Program Ad Hoc Committee | Patti Giuliano | Mary Wintermote |
| Coordinator Transition Ad Hoc Committee | Erica Anderson, ACP and Javan Johnson, TBLS-BCP, ACP | Megan Goor, TBLS-BCP |
| e-Group Policy Ad Hoc Committee | Heidi Beginski, TBLS-BCP | Mona Hart-Tucker, ACP |
| e-Newsletter (co-chairs) | Sheila Posey, TBLS-BCP | Marsha Smith, CP |
| Ethics Handbook Ad Hoc Committee | Ellen Lockwood, ACP, RP | Holly Huckabee, TBLS-BCP |
| Membership Renewals/Spot Audit Ad Hoc Committee | Lori Winters, CP | Linda Carrette, TBLS-BCP |
| Pro Bono Ad Hoc Committee | Connie Nims | Susan Wilen, R.N. |
| Standing Rules & Bylaws | Stephanie Sterling | n/a |
| State Bar College Membership Application Review Ad Hoc Committee | Michele Flowers Brooks, CP | Michelle Beecher |
| TAPS 2015 Planning Committee | Clara Buckland, CP | Erica Anderson, ACP |
| TAPS 2016 Planning Committee | Erica Anderson, ACP | Megan Goor, TBLS-BCP |

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| TBLS Exam Helpful Hints Guide | Javan Johnson, TBLS-BCP | Edna Garza, TBLS-BCP |
| Vendor Liaison Ad Hoc Committee (co-chairs) | Shannon Shaw, CP | Jay Williams, TBLS-BCP |

Liaison appointments:

| Organization | Liaison |
|---|--------------------------|
| American Alliance of Paralegals (AAPI) | Sharon Wornick, CP |
| American Association for Paralegal Education (AAfPE) | Janet McDaniel, CP |
| American Association of Legal Nurse Consultants (AALNC) | Susan Wilen, R.N. |
| American Bar Association/Paralegals (ABA) | Linda Carrette, TBLS-BCP |
| National Association of Legal Assistants (NALA) | Georgia Seeley, ACP |
| National Federation of Paralegal Associations (NFPA) | Olga Burkett |
| Office of the Court Administration | Michelle Beecher |
| Texas Alliance of Paralegal Associations | Erica Anderson, ACP |
| Texas Association of Legal Professionals (TALP/NALS) | Marsha Smith, CP |
| Texas Board of Legal Specialization (TBLS) | Holly Huckabee, TBLS-BCP |
| Texas Lawyers for Texas Veterans | Mona Hart-Tucker, ACP |
| Texas Young Lawyers Association (TYLA) | Edna Garza, TBLS-BCP |

TAPS 2015

The Division's three day, multi-track CLE seminar, Texas Advanced Paralegal Seminar, **TAPS 2015: Saddle Up for CLE!** was held in Fort Worth from September 30 through October 2. It was a big success with over 215 paralegals attending. The event had great sponsorship and vendor support. As the TAPS app saw success its first year in 2014, the Division continued its use for the event. to include CLE sessions, socials, and a directory of attendees. The Click game within the app promoted interaction between attendees in a photo scavenger competition. The event was capped with the Friday attendees luncheon with keynote speaker, Hon. David Keltner, on *Appellant Arguments: The Good, the Bad, and the Ugly*, with insightful information on arguing before the Texas and United States Supreme Courts. The first two players of the app Click game to correctly submit their photos for points won a prize. The TAPS 2015 Scholarship recipient was recognized, as were all the sponsors. At the close of the luncheon and conference three lucky individuals were drawn as grand prize winners of \$500 a cash prize: Nancy Strack of

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Grapevine; Michele Rayburn of Fort Worth; and, Lori Tiner of Carrollton, Texas.

TAPS 2016 Planning Committee Meeting

The first meeting of the TAPS 2016 Planning Committee was held on January 22 and 23 at the Wyndham Riverwalk San Antonio. With the Division's 35th anniversary occurring during this event, the committee chose a theme focused on celebration and the community: **TAPS on Track – Journey to Excellence**. The committee wanted the attendees to have an opportunity to celebrate with the community of San Antonio and focused on incorporating the San Antonio Food Bank in several ways to the conference from decorations to opportunities to interact with representatives of the San Antonio Food Bank.

President Anderson chaired the committee and appointed the following individuals who agreed to serve on the committee:

Megan Goor, TBLS-BCP - Board Advisor/Scholarship Chair
Patti Giuliano – Chair, Vendors
Rhonda Brashears, TBLS-BCP, CP - Chair, Online CLE
Misti Janes, TBLS-BCP, Chair, Conference App
Star Moore and Julie Sherman, Co-Chairs, Marketing
Javan Johnson, TBLS-BCP, and Jennifer Barnes, CP, Co-Chairs, Socials
Susan Wilen, R.N., Speaker Chair
Kerri Alexander-Overfelt Co-Chairs, Door Prizes
Deborah Andreacchi, Registration
Rhonda Brashears, TBLS-BCP, CP, Meeting Planner
Public Members: Frank Hinnant, Innovative Legal Solutions
Jim Hollerbach, Hollerbach & Associates
Dean Shaw, Kim Tindall & Associates
Joan Hauser, Esquire Litigations Solutions

Retirement of Coordinator, Norma Hackler, CMP

In January of 2016, Norma Hackler, CMP, the Division's Coordinator of 25 years retired. After careful planning by the Coordinator Transition Ad Hoc Committee, the baton was handed to Rhonda Brashears, TBLS-BCP, a long-time member of the Division, who had served in multiple capacities to the Division. Throughout the process, how best to meet the future needs of the Division and how Coordinator will best help the Division were examined by the ad hoc committee members. The interview process was lengthy and eye-opening to the committee members. After interviews, the ad hoc committee recommended that Ms. Brashears be selected as the Coordinator. One of 27 candidates, she outshone the rest with her historical knowledge of the Division. A retirement party celebrating Ms. Hackler's service to the Division was held the evening after the Spring Board of Directors Meeting at Maggiano's in the Domain of Austin. Ms. Hackler's contributions to the Division will ripple far into the Division's future.

Division Overseas Trip

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In its annual trek across the sea, a group of twenty-four made its way to Florence, Italy. After touring the streets of Florence, the travelers ventured into the Chianti countryside, including the towns of Greve, Siena, Montepulciano, Monticchiello, and Montalcino, viewing beautiful scenery and sampling cheese and wine, as well as fine dining. Moving into the Umbria region to visit Assisi and the Basilica of St. Francis, followed by Pisa and Lucca, with the final day as free time. Several chose to explore Florence further, with some venturing to Venice. The travelers ended their trip with fond farewells and hopes to see each other at the next overseas adventure.

TAPA 2016

The Texas Alliance of Paralegal Associations ("TAPA") 2016 Leadership Conference was hosted by the Houston Metropolitan Paralegal Association on April 8 and 9, and entitled, "TAPA 2016: Be the Vision! Visualize. Imagine. Believe Be." Both President Anderson and President-Elect Goor attended, and reported on Division business.

2016 Annual Meeting

The 2016 Annual Meeting of the Paralegal Division was held in Fort Worth at the Silver Fox on June 17 with a theme of "First Responders." 2015-2016 President Erica Anderson, ACP, presided. The keynote speaker was Shawn Tuma of Scheef & Stone. His presentation focused on cybersecurity and the unknown dangers lurking in the legal profession.

President Anderson recognized the members of the 2016 Annual Committee Chair, Katrina Lea, as well as the 2015-2016 Board of Directors, and the various committees' volunteers. By motions duly made, seconded and voted upon, the reading of the minutes of the 2015-2016 Annual Meeting was waived. Thereafter, President Anderson presented the State of the Paralegal Division address. President Buckland presented the Exceptional Pro Bono Service Award to Rachael Watson of District 3 and the Division's Award of Excellence to Javan Johnson, TBLS-BCP of District 14. Outstanding Committee Chair Awards were presented to Pamela Etie (Membership Chair) and Shannon Shaw (Vendor Liaison). Plaques expressing appreciation for their service were presented to the outgoing directors in even numbered districts, specifically to District 1, Seat 2 Director, Linda Carrette, CP (Houston), District 6 Director, Georgia Seeley (Lubbock), District 10 Director, Sharon Wornick, CP (Conroe), and District 16 Director, Olga Burkett (El Paso).

President Anderson administered the Oath of Office and installed the 2016-2017 Board of Directors as set out below.

Officers:

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| President: | Megan Goor, TBLS-BCP |
| President-Elect: | Mona Hart Tucker, CP |
| Secretary | Mary Wintermote |
| Treasurer | Jay Williams, TBLS-BCP |

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2015-2016 Division History

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| Parliamentarian | Stephanie Sterling, TBLS-BCP |
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Directors:

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| District 1 | Holly Huckabee, TBLS-BCP |
| District 2 | Jay Williams, TBLS-BCP |
| District 3 | Mary Wintermote |
| District 4 | Stephanie Sterling, TBLS-BCP |
| District 5 | Susan Wilen, RN |
| District 6 | <i>Vacant</i> |
| District 7 | Shandi Howard, CP |
| District 8 | <i>Vacant</i> |
| District 10 | Jennifer Barnes, CP |
| District 11 | Janet McDaniel, CP |
| District 12 | Michelle Beecher |
| District 14 | Javan Johnson, TBLS-BCP, ACP |
| District 15 | Edna Garza, TBLS-BCP |
| District 16 | Rebecca Lopez |

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