

TPIJ

Paralegal Journal





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PRESIDENT'S *Message*

by Susi Boss, President

We are in the downhill run of my year as President and while it has moved quickly I hope we have all taken the time to slow down and spend more time with our families and friends but to also find ourselves as paralegals. TAPS 2021 was amazing and we are still hearing great things from it. Ready for TAPS 2022 in Ft. Worth?? It's going to be amazing.

You all have made our anniversary of 40 years an amazing show of how Texas does it bigger and better and I expect all of us to keep that going.

The editor for the TPJ and the editor for the "Paralegal Pulse" work hard and tirelessly to bring you great information,



add to your knowledge and have some fun as well. Take advantage of what they have found and developed.

Remember during this time to take advantage of the seminars and webinars our Directors have and are still putting together for you. Remember to KEEP

YOUR CLE forms.

Please always find your voice through the TPJ!

Keep up with what's going on in your local districts and share that information. Frustration is sharing information and then someone saying, "Oh, I knew that and have been doing it for weeks." Keep the rest of your co-workers in the light of

new rules, upcoming CLEs, and current courthouse protocols.

Make sure you make contact with your District Director and make arrangements to obtain your 40th Anniversary gift and pin. Having trouble making contact, just let me know or Lisa Pittman, President-Elect.

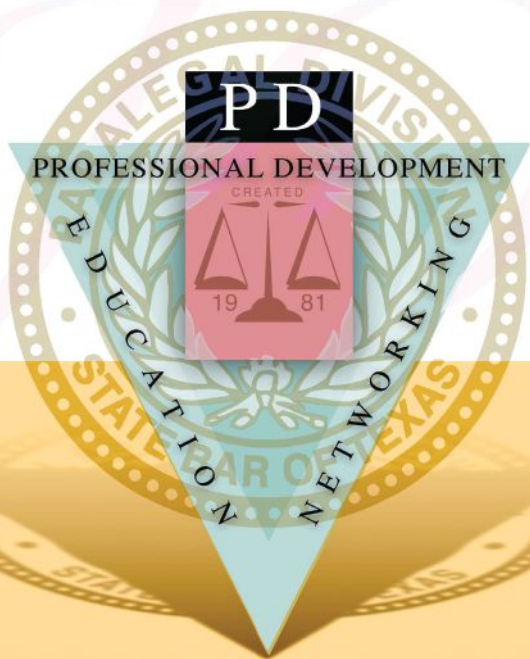
I am so proud of this organization and all of the men and women who worked so hard to make it come to fruition with the support and hard work of the State Bar in having faith in our profession. Congratulations and happy 40th Anniversary.

Susi Boss

President 2021-2022

Paralegal Division

State Bar of Texas



***Be a step above the rest –
Join the Paralegal Division
of the State Bar of Texas***

PD provides many benefits for career growth:

- Networking with paralegals across the state
- Powerful CLE opportunities such as Texas Advanced Paralegal Seminar (TAPS)
- Professional Development
- Professional magazine with substantive articles and updates from across the nation

THINK ABOUT IT.....

an organization designed just for YOU! ENHANCE YOUR CAREER by becoming a part of PD today.

Go to www.txpd.org and see for yourself or contact the PD Coordinator via email at pd@txpd.org or call (806) 443-2209

TPIJ

Texas Paralegal Journal

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EDITOR'S *Note*

It is with great pleasure and excitement that the Publications Committee presents this edition celebrating the Paralegal Division's 40th Anniversary! A big "thank you" to Javan Johnson for taking the time to provide the featured article that outlines the Paralegal Division's rich history. There are well-wishes from various attorneys, judiciary, leaders in the community from across the state, and local and national paralegal associations included here. In addition, a tribute is included to two people who have been a part of the background of the Paralegal Division for quite some time and have helped make it a success—our webmaster, Len Hardin, and magazine graphics artist, David Timmons.

Because we have so many photographs depicting the Paralegal Division's history, we thought it fitting to present them in a slide show on our YouTube page. The slide show can be found here.

Also, in this edition, of course, is the summary of the most current TAPS and Annual Meeting. After our first virtual TAPS last year, this past year's in-person TAPS in San Antonio was a welcomed event to many attendees and vendors.

Megan Goor, Editor, *Texas Paralegal Journal*



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*Three-day CLE event sponsored by the Paralegal Division of the State
Bar of Texas*

SAVE THE DATE!

September 28-30, 2022

Fort Worth, TX

Event details—April 2022

www.txpd.org

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E-mail tpj@txpd.org.

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Focus on...

Paralegal Division Celebrates Its 40th Anniversary

By: Javan Johnson, ACP, TBLS-BCP

I am not sure our founding group would have ever foreseen that we would be so strong and mighty at the age of 40! Some of you have

been members from the very beginning, others of you may have just joined in the last year or so, and the rest of you have come somewhere in between for the past 40 years. Happy Anniversary to each and every one of you for being a part of this wonderful organization.

The Paralegal Division of the State Bar of Texas needs to be very proud that we were the very first paralegal group to be a part of a state bar anywhere in the United States. We are the first and still the strongest. We have now withstood 40 years of continuity of professionalism. We adopted the term of "A Division With Vision" and with the ongoing outstanding leadership of our organization, we meet that mission every single year. Here is a glimpse of what our 40 years have accomplished:

On October 23, 1981, the State Bar of Texas formed the first paralegal division of a state bar in the United States. That is the formal date the Paralegal Division (PD), formerly the Legal Assistants Division, was established. October 23, 2021 marked the 40th Anniversary of the Division. The official purpose for the PD is "To enhance paralegal's participation in the administration of justice, professional



**State Bar of Texas President
Sylvia Borunda Firth**

The State Bar of Texas is immensely proud of the Paralegal Division, the first of its kind in the nation. Paralegal professionals are invaluable to the administration of justice, and the division's commitment to education, communication, and professionalism among paralegals across Texas is to be honored. I am thrilled to offer the bar's deepest congratulations in celebrating the division's 40th anniversary.



**Hon. David Keltner,
former Justice on the Texas
Court of Appeals,
Kelly Hart & Hallman
Fort Worth, TX**

I was proud to be a liaison on the Board of Directors of the State of Bar of Texas when we approved the formation of the Paralegal Division. Over the last 40 years, you have increased paralegal competence, demanded professionalism, and helped lawyers better serve Texans. The division is a treasured asset of the State of Bar of Texas and we congratulate you on over-achieving your mission.



Hon. Linda B. Thomas
Retired Chief Justice, Fifth
District Court of Appeals
Dallas, TX

I want to extend my sincere congratulations to the Division. I have never been involved with a more dedicated and professional group of people.



Hon. Beth Watkins
Fourth Court of Appeals
San Antonio, TX

We had a great time at the TAPS 2021 seminar. It was so good to see everyone after more than eighteen months of virtual conferences, and even the masks and Covid protocols couldn't hide the smiles shared when friends reunited. I was especially grateful to have the opportunity to speak with the group about the importance of volunteering and becoming involved in our communities. Congratulations to the State Bar of Texas Paralegal Division on 40 years of service—you don't look a day over 39!

responsibility and public service in cooperation with the State Bar of Texas.” PD has been a leader, and remains a leader in continuing to establish the parameters of professionalism issues facing our profession.

As is done for any milestone birthday, the Board of Directors of PD thought it appropriate to share a historical overview of the past 40 years for our members. We hope you enjoy seeing the growth and progress PD has made through those years. It is only the highlights—there was a lot more work going on that this history overview has time to reveal!

1982: The Bylaws, Code of Ethics, letterhead, seal, membership cards and membership certificates were approved, as well as nine standing committees were created to conduct the work of the Division. Charter memberships were approved during that first year through June 29, 1982. PD had 1013 charter members as of that date. Charter members were given a nice certificate that bore the words “Charter Member” and the date June 1, 1982, and signed by the State Bar President at that time, Wayne Fisher. Kathryn King Richards was the first “Chair” [as it was then known rather than “President”] of the PD. State Bar of Texas [SBOT] President Fisher delivered the luncheon address at the first annual meeting of the PD and shared these words:

Your presence here today confirms my belief that the time has come for the legal profession to recognize the paralegal profession and for us to move forward in cooperation and mutual support to provide better services to the public we serve... Let us assure you that the State Bar is not trying to impose anything on the paralegals in Texas, much less the paralegal profession throughout the country. We realize that what we are doing will have an impact, and for that reason we are just as

concerned as others may be. We only ask that your Division be a chance to show what that impact will be. Active participation by the membership will have a direct effect on that impact. ...I challenge you to fight for what you believe in. ...

The first Texas Forum was held with the PD Board of Directors meeting with the Legal Assistants Committee of the SBOT, as well as paralegal educators and administrators to begin a discussion of standards of paralegal education in Texas, certification or licensing of legal assistants, and problems relating to utilization of legal assistants.

1983: Texas Forum II was held in San Antonio. The meeting focused on sharing ideas on improving formal education and training being offered for legal assistants by various educational institutions. The Standing Rules were established that enhance the work of the Division as to the Bylaws. Questionnaires were mailed to paralegals regarding the issue of voluntary certification. Even at this early date, PD was looking into enhancing the professionalism of paralegals. Kathryn King Richards served her second term as Chair and she received the Award of Excellence in recognition of her service as the Board's first Chair. Gary McNeil was appointed by the SBOT as the PD's staff attorney.

1984: Texas Forum III was held in Corpus Christi with the Legal Assistants Committee of the SBOT and paralegal educators. A discussion was held regarding school placement of legal assistants, ethics courses, certification, uniform standards for education, internships, and training of legal assistants. A second questionnaire was sent out to paralegals regarding voluntary certification. Education programs were reviewed and the first Division newsletter was published. Annual Meeting was held

Focus on...

in Dallas with a theme of “Unauthorized Practice of Law —The Gray Areas.” Sandy Hardin with the SBOT was presented with the Award of Excellence for her many hours of time devoted to assisting in the founding and development of the PD. Elaine Peeples was elected as the President of the PD. A special committee worked to produce a formal definition of “legal assistant” and determined it was a little premature. The first attorney/legal assistant dinner was held in Houston.

1985: Texas Forum IV was held in San Antonio with a presentation on “Education of Legal Assistants in the Use of Computers.” The public hearings regarding voluntary certification began. There were initially two proposals: (1) create a PD exam, or (2) utilize the CLA exam with a Texas substantive law section added. Membership grew to 1500 members. Elaine Peeples remained as Chair for her second term. The second survey regarding voluntary certification was mailed. Annual Meeting was held in Houston. The definition of a legal assistant, as adopted by the Board of Governors of the American Bar Association was adopted by the PD:

“A legal assistant 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.”

1986: A sustaining member category was added for law firms, corporations, and other individuals or entities supporting the Division. It was decided that more fact

finding was needed regarding the voluntary certification issues. Public hearings on proposals for voluntary certification were held in seven major cities. Cindy Mankus was elected as Chair for 1986-1987. The *Attorney’s Guide to Practicing with Legal Assistant* was published and available for sale by the State Bar. Texas Forum V was held in Dallas. The PD adopted the definition of legal assistant which had been adopted by the ABA.

1987: A Task Force for Voluntary Certification was established comprised of three legal assistants, one attorney and one attorney-educator and was charged with determining whether a voluntary certification exam would be developed for legal assistants. The Board of Directors resolved to go forward with a Texas exam, although no definitive exam was discussed. Educational programs were created in a list format that offered paralegal training to be available to attorneys and paralegals. Mock grievance procedures were conducted by the Ethics Committee. Jan Soderman served as Chair for 1987-1988.

1988: Funds were allocated for future implementation of a certification program. Membership increased to 1800. A special committee was formed to determine whether an executive director should be retained. Requests for proposal were sent to test design vendors after which the Board conducted interviews then submitted a proposal to the membership to contract with NALA for the use of the CLE examination as the general component to a test. The vote failed. Cathrue Benoit served as Chair for 1988-1989.

1989: The necessity for hiring an Executive Director became apparent and the Board voted that one would be hired on a contract basis. A look at whether to allow PD to become a non-profit corporation was voted down. A special committee was formed to



Hon. Sol Casseb
former 288th Judicial District
Court Judge
San Antonio, TX

Congratulations on this momentous occasion. I am honored to be involved in the State Bar Paralegal division through the years. What a wonderful organization without which lawyers could not function. Here’s to many more years of success!



**Lawrence Morales II, President
San Antonio Bar Association**

**Congratulations to the
Paralegal Division of the State
Bar on celebrating its 40th
Anniversary! Just as it takes a
village to raise a child, it takes a
dedicated team to represent cli-
ents through their legal issues.
Paralegals are an integral part
of that team, and for 40 years
the Paralegal Division has
trained and provided invaluable
resources to help paralegals
sharpen their skills. Thank you
for all that you have done, and
continue to do. To another 40
years of success!**

provide recommendations for processing membership applications. Texas Forum VII was held in Houston. Annual Meeting was held in San Antonio. Gerry Malone received the Award of Excellence in recognition for her extensive work in assisting in the preparation of the *Attorney's Guide to Practicing with Legal Assistants*. Cathrue Benoit remained as Chair for 1989-1990.

1990: An ad hoc committee was formed to digest the data on voluntary certification. A formal list of benefits was prepared and published to members. The State Bar agreed to keep track of continuing legal education hours and provide a transcript for \$5.00. Norma Hackler was hired as Executive Director. An in-depth look was taken on the recommendations for processing membership applications, including "substantive" and "law related legal work" definitions. Texas Forum VIII was held in San Antonio and Annual Meeting was held in Dallas. Michele Boerder served as Chair for 1990-1991.

1991: The voluntary certification digest was released and the consensus was that PD would support a certification exam along the lines of the Texas Specialty Examinations for Attorneys. A Voluntary Certification Long Range Planning Task Force was created to work with PD. This was the year that student membership category was added. The Division's finances/bookkeeping totally separated from the Bar during this year to allow us to handle our own accounting. Governor Ann Richards officially proclaimed, for the first time, that October 23rd would be Legal Assistant's Day in Texas. The Ethics Committee prepared an ethics brochure entitled "Professional Ethics and the Legal Assistant." Texas Forum IX was held in Austin and Annual Meeting was held in Houston. The PD celebrated its 10th anniversary. Sharyn Aust Smith served as Chair for 1991-1992.

1992: The official PD publication was formally named by Betsy Horn of Fort Worth as *Texas Paralegal Journal*. The Joint Task Force on Specialty Certification made significant advances toward establishing a plan toward certification exams for paralegals, and the first look was taken at the TBLS exams as that vehicle. Joint CLE seminars with local associations were sponsored in smaller areas. Texas Forum X was held in Dallas and Annual Meeting was held in Corpus Christi. Awards of Excellence were presented to Judge Linda Thomas and Spencer Relyea for their outstanding commitment to the PD. Sharyn Aust Smith remained as Chair for 1992-1993.

1993: The Concurrent Resolution No. 69 was signed by Bob Bullock, President of the Texas Senate, and Pete Laney, Speaker of the House, that October 23rd of each year would be Texas Legal Assistant's Day. Specialty certification exams were approved by the Texas Supreme Court on May 18, 1993 to be given to paralegals by the Texas Board of Legal Specialization (TBLS). Texas Forum XI was held in Austin, and Annual Meeting was held in Fort Worth. Debra Crosby served as Chair for 1993-1994.

1994: The *Texas Bar Journal* January issue was dedicated to paralegals. The first specialty exams were given by TBLS on March 26, 1994 to 157 paralegals. Texas Forum XII was held in Austin and Annual Meeting was also held in Austin. The membership application process began making major changes. A member benefits flyer was developed. Gary McNeil of TBLS was presented the Award of Excellence. Debra Crosby remained as Chair for 1994-1995. The Board voted to change the title of "Chair" to "President," and Sally Andress was elected as the first President to serve the 1995-1996 term.

1995: The *Texas Paralegal Journal*

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became a full magazine. The Long Range Planning Task Force was formed to begin studying future professionalism issues. Texas Forum XIV was held in Austin. Advanced seminars were offered in a few areas of law. TBLS conducted a survey to determine new subject areas for the exams. Annual meeting was held in Dallas. Melanie Villarreal served as President for a portion of 1996-1997 but had to resign and the remainder of the term was filled by Wendi Rogers.

1996: The State Bar of Texas made its insurance programs available to PD members. Advanced seminars were planned to coincide with the TBLS specialty exams. A Continuing Legal Education committee was formed to assist local associations in providing CLE to their areas with help from PD. Budgeting was made available for the *Legally Speaking* programs to be taped working with the El Paso Community College. New specialty exams were approved for criminal, probate and real estate law. Texas Forum XV was held in Austin. Wendi Rogers continued as President for 1997-1998.

1997: The Long Range Planning Task Force (LRPTF) hosted the Fall TAPA meeting to share information regarding the professionalism issues and was charged with preparing a preliminary digest of information. The development of a video on how to utilize paralegals was first discussed. Annual meeting was held in Houston. Texas Forum XVI was held in Austin. A joint committee was formed with the State Bar for Pro Bono Partners Project for attorney/legal assistant teams. The first Exceptional Pro Bono award was presented to Patricia Hammer. Jim Buchanan was elected as President for 1998-1999.

1998: The Long Range Planning Task Force (LRPTF) held its first public hearing held in Corpus Christi at the

annual meeting. It was determined that the production of tapes regarding the utilization of paralegals would proceed, targeted for law schools. The Executive Director's title changed to PD Coordinator. The Continuing Education Committee was charged with appointing a nine member committee to plan an annual seminar. The LRPTF set focus group meetings in Corpus Christi, Fort Worth, Amarillo, Lubbock and the Valley. Annual Meeting was held in Corpus Christi. Lisa Sprinkle was elected as President for 1999-2000.

1999: "Legal Assistant University" (LAU) was first held in San Antonio with 270+ paralegals coming together for a three-day seminar covering a wide variety of topics. This was just the beginning of an annual three-day multi-track seminar that has become a much demanded event every year. The March 2000 *Texas Bar Journal* issue was dedicated to paralegals. Public hearings were continued throughout the state by the LRPTF. *Legal Speaking* had taped 40 episodes and were being marketed. Texas Forum XVII in Austin. Annual meeting was held in Fort Worth. Javan Johnson was elected as President for 2000-2001.

2000: The public hearings were completed and the information was digested by the LRPTF. A Joint Task Force was formed with the Paralegal Committee to continue examining the issues of professionalism. For the first time The LAU Scholarship was named for Nancy McLaughlin, our TPJ editor who we lost in a car accident. A five-year review was conducted of the *Attorney's Guide to Practicing with Legal Assistants*. The State Bar of Texas asked each section and division to appoint a liaison to the Unauthorized Practice of Law Committee, and the PD complied. LAU was held in Austin and Texas Forum XVIII was also held in Austin. Annual Meeting was held in San Antonio. Kristine Farmer was



**Hon. Audrey Moorehead,
County Criminal Court 3—
Dallas
President, Texas Association of
County Court At Law Judges**

The Paralegal Division of the State Bar of Texas has been mission and goal focused since its inception. The Supreme Court has described the Division as a vital resource to firms; however, I would submit that the Division is invaluable to the State Bar of Texas. The members of the Division assist Texas lawyers in promoting the practice of law in an ethical and professional manner. I, not only, congratulate the Paralegal Division on this landmark; but also, share my deep appreciation for their service to the legal community. Best wishes.



Hon. Sharen Wilson
Tarrant County District
Attorney
Fort Worth, TX

Congratulations to the Paralegal Division on your 40th anniversary. The role paralegals play in our legal system is crucial. Because you pay great attention to detail and thoroughly know the subject, you literally make people better lawyers. That also means you help us help all of our clients. All of you, including the 13 employees in my office who are members of the Fort Worth Paralegal Association this year, are greatly appreciated. Thank you for all you do and happy anniversary!

elected to serve as President for 2001-2002.

2001: The State Bar College began offering Associate membership for paralegals. TYLA endorsed the "Profiling the Paralegal Profession" video. PD celebrated its 20th Anniversary beginning in 2001. LAU was held in Dallas. Texas Forum XIX was held in Austin. State Bar College was approached about making a membership category for legal assistants. The PD e-group began to be set up through the website. The Board approved the formation of a joint task force with the State Bar, consisting of attorneys, legal assistants and judges to further research the possibility of more formally defining the paralegal profession in Texas. That committee began its work by discussing what other states are doing with regard to regulation and the different types of regulation. A salary survey was approved to be conducted to the membership. Rhonda Brashears was elected to serve as President for 2001-2002.

2002: Charter members of the PD were located to join in the 20th Anniversary celebration at annual meeting, and approximately 20 were able to attend the Annual Meeting luncheon and were presented with corsages and 20-year lapel pins, and were mailed a 20-year certificate. LAU was held in Houston with the theme "2002 LAU, It's a Tradition." The Joint Task Force sought clarification of the definition of "legal assistant." MytexasBar.com was made available to PD members for updating membership information. Texas Forum XX was held in San Antonio. The salary survey was completed and published in the *TPJ*. The Long Range Task Force continued gathering information from other states. The Award of Excellence was awarded to Debra Crosby as editor of the *Texas Paralegal Journal*. Melissa Sherman was elected to serve as President for 2003-2004.

2003: A public relations ad was

developed for PD. LAU was held in San Antonio and Annual Meeting was held in Houston. An online survey was conducted by the Joint Task Force regarding the preferred term "legal assistant" or "paralegal." An ad hoc committee was formed to review all that would need to be done for a name change to include "paralegal." The online CLE program began being developed. A job bank was added to the PD website. The Joint Task Force proposed a new definition of "paralegal." The Board voted that individuals who have been convicted of a felony were ineligible for membership in the PD. A dues increase was implemented by the PD for the first time in a number of years. Redistricting of a few districts was addressed because of low membership and no director leadership. State Bar College began offering associate membership to paralegals. Mandatory CLE began to be addressed for membership in the PD. The Long Range Task Force reported that the overwhelming preference from the survey conducted was for the use of the title of "paralegal" as opposed to "legal assistant." Kim Cantu was elected to serve as President for 2004-2005.

2004: An emeritus membership category was added, and other categories were restructured. PD introduced the Ambassador program comprised of past presidents of PD to travel and speak on behalf of PD. Annual meeting was held in San Antonio, and LAU was held in Fort Worth. The first class of TBLS board certified paralegals were given 10-year certificates and annual meeting. The Long Range Planning Task Force began the work of re-defining the term "legal assistant" to "paralegal." Texas Forum XXIII was held in Austin. The online CLE program was fully implemented, and mandatory CLE for membership in PD was also implemented. The PD entered into a contract with LegalSpan to offer online CLE. The Award of Excellence was presented to Javan Johnson. Ellen Lockwood was elected to

Focus on...

serve as President for 2005-2006.

2005: On April 8, 2005 the State Bar approved the name change from Legal Assistants Division to the Paralegal Division as a result of the bylaw election by the PD membership. A PD representative was appointed to serve on the Board of Directors of the State Bar College. PD made its first overseas travel to London. LAU was renamed the Texas Advanced Paralegal Seminar (TAPS), and was held in Austin. The State Bar approved the definition of “paralegal,” and the Division changed its name to Paralegal Division. PD members were included for the first time in the Texas Legal Directory. Pamela Horn was awarded the Award of Excellence. Javan Johnson was elected to serve as President for 2006-2007.

2006: PD celebrated its 25th Anniversary on October 23, 2006 with a special event during TAPS in Dallas at Delaney Vineyards with a theme of “Putting on the Ritz.” An online salary survey was conducted and the results tabulated. PD traveled to Paris in April. New “paralegal standards” were approved by the PD and the State Bar, and began to be marketed after the PD issued a press release to the State Bar. The paralegal standards were a huge milestone for the PD after many years of work to obtain a formal definition for the term “paralegal.” A charter member Michele Boerder gave a history of the Division’s 25 years at Annual Meeting in Austin and introduced past presidents in attendance, as well as special guests Tom Hanna, Sandy Hardin and Bob Towery who were instrumental in the formation of the Division. Information regarding the Paralegal Standards was also presented. Kim Cantu was awarded the Award of Excellence. Patricia Giuliano was elected to serve as President for 2006-2007.

2007: Work began for an ethics handbook which was written by six PD members —Ellen Lockwood, Lauri

Borski, Rhonda Brashears, Debra Crosby, Javan Johnson, and Lisa Sprinkle. TBLS issued new certificates to Board Certified Paralegals to adopt the term of “Paralegal” to those previously certified Legal Assistants. The beginning of the Mentor Program began this year. The PD worked with the SBOT MCLE department to allow paralegals to obtain their MCLE records with the SBOT through the PD website, and a new area was developed on the PD website to allow the PD members to upload their CLE hours to create their own depository. The previous Legal Assistant’s Day House Bill for “Legal Assistant’s Day” was obsolete due to the change in terms, and a new bill was passed setting October 23rd at “Paralegal Day.” The PD took its third trip to Florence, Italy in April. Annual Meeting was held in San Antonio in June. TAPS 2007 was held in Dallas and the theme was “It’s a Perfect Score! TAPS 2007-CLE and More!” Rhonda Brashears was elected to serve as President for 2007-2008.

2008: The *Paralegal Ethics Handbook* was completed and published by West Publishing and became available for sale in the fall. The theme of “A Division With a Vision” was adopted and is still used today. Surveys were conducted in 4 districts for consideration of redistricting for better representation. The prior PD Bulletin was renamed Paralegal Division QuickNotes (PDQ). The annual paralegal trip in the spring 2008 was to Ireland. The *Profiling the Paralegal Profession* video was completed and was passed out to attorneys at the 2008 State Bar of Texas Annual Meeting. One-half hour of eligible MCLE credit was obtained for those that view the video. The *Paralegal Ethics Handbook* went into its first revision and royalties were received by the PD from ThomsonWest from sales of the book. Stephanie Hawkes was elected as President for 2009-2010.

2009: The European trip took the travelers to Greece. The TAPA meeting was



President Kimberly M. Naylor
Tarrant County Bar Association
Fort Worth, TX

Whether a large law firm or a sole practitioner, Texas lawyers continue to have to adapt to changing technology, court rules and financial constraints. One thing that has remained consistent is the need for well-trained paralegals. Paralegals are key to our professional success as lawyers. The Paralegal Division of the State Bar of Texas, led by volunteer paralegals from around the State, provides valuable resources such as education, professional development and publications to keep paralegals up to date on a variety of topics. Congratulations to the Paralegal Division of the State Bar of Texas on 40 years of excellent commitment and dedication to our paralegals!



Leo Figueroa, Executive Director
Texas Board of Legal Specialization, Austin, TX

We at TBLS extend our heartfelt congratulations to the Paralegal Division's 40th anniversary. Following our mission of serving the public interest and advancing the standards of the legal profession, TBLS established our paralegal certification program in 1994 to recognize the quality and commitment of paralegals who have achieved a level of skill and special competence in particular areas of law. Over the years, TBLS has worked closely with the Paralegal Division in promoting the pursuit of excellence in the profession by becoming Board Certified. We invite all paralegals to take that next step in their profession by applying for Board Certification in one of our eight areas for paralegal certification. <https://www.tbls-bcp.org>. Again, congratulations on the Paralegal Division's 40th anniversary. Keep up the great work.

held in Texarkana. The Mentor Program was first discussed and a questionnaire was offered during the TAPS seminar to inquire of interest. TAPS was held in League City with the theme “*TAPS 2009 — Chart Your Course—Sharpen Your Mind.*” A PD Member Services Coordinator was hired to assist with membership. The Award of Excellence was presented to Ellen Lockwood for her work on the *Paralegal Ethics Handbook*. Debbie Oaks was elected as President for 2010-2011.

2010: Texas Forum XXVII was held in Dallas. The PD European travelers went to Spain. An ad hoc committee was appointed to define language on “Crimes of Moral Turpitude” and a definition was adopted. TAPS was held in Austin with the theme “*Capitalizing on CLE—TAPS 2010.*” A Community Service initiative was started. Susan Wilen was elected as President for 2011-2012.

2011: The PD increased social media presence including LinkedIn and the PD Blog. Texas Forum XXVIII was held in Dallas. PD sponsored a booth at the NALA convention held in Dallas/Plano. The online CLE library continued to grow. The PD European travelers enjoyed a trip to Germany and Austria with a CLE event at the Palace of Justice. Annual Meeting was held in San Antonio with keynote speaker Jeanne C. “Cezy” Collins who presented “Practicing Accessible Justice.” TAPS was held in Fort Worth with the theme “*TAPS 2011- Pearls of Wisdom.*” This was the 30th celebration of the PD. Joncilee Davis was elected as 2012-2013 President.

2012: Texas Forum was held in Irving. The PD Annual Trip was in April and the travelers went to Italy. TAPS was held in El Paso. TAPS was held in Addison with the theme “A Direct Flight to First Class CLE.” The attendees assembled bicycles for the Texas Scottish Rite Hospital for Children’s Bike Rodeo. A TBLS Helpful

Hints Guide committee was formed and was written to assist PD members who were studying for the TBLS exams—the guide was written to cover every area of law for the TBLS specialty exams. Misti Janes was elected as 2013-2014 President.

2013: The 32nd Texas Forum was held in Dallas and TAPS was held in San Antonio with the theme “TAPS 2013: Spectacular CLE.” PD’s social media traffic increased. A felony application for applicants that had been convicted of a felony NOT involving a crime of moral turpitude was approved. District 13 was dissolved and merged with District 1 in Houston due to a small number of members. Annual meeting was in Dallas with a theme of “*Paralegals Evolve into Success.*” Julie Sherman of Fort Worth won the Exceptional Pro Bono Service Award. A TBLS Helpful Hints Guide was appointed to prepare a guide for applicants taking the TBLS exam and the guide was approved by the Board and made available on PD’s website for PD members taking the exam. Clara Buckland was elected as 2014-2015 President.

2014: Annual Meeting was held in Fort Worth and was the theme was “The Paralegal Express: Your Train to Success.” The Exceptional Pro Bono Award was presented to Susan Wilen. TAPS 2014 was held in Austin and the theme was “*TAPS 2014: The Beat Goes On!*” The new TAPS app for the event was rolled out thanks to Misti Janes who took on that task. A salary survey was conducted. The PD’s annual trip was to Vienna and Prague. Erica Anderson was elected as 2015-2016 President.

2015: TAPS was held in Fort Worth with a theme of “*Saddle Up for CLE.*” Texas Forum was held in Dallas with the theme of “Ethics in the Lone Star State: Supervisory Responsibilities of Legal Counsel.” TAPS was held in Denton. Norma Hackler, PD Coordinator of 25



years submitted her letter of resignation to retire from the PD. A PD Coordinator Search Committee was formed to begin to work through the transition of Norma's retirement and the hiring of a new PD Coordinator. Annual Meeting was held in San Antonio. Megan Goor was elected to serve as President for 2016-2017.

2016: This marked the 35th anniversary for the Division, and was a milestone year with the retirement of Norma Hackler as the PD's first Coordinator who served for 25 years. A retirement celebration was held in Austin in February in her honor. PD's Past President Rhonda Brashears was hired to serve as PD's second Coordinator. The *Texas Paralegal Journal* became exclusively digital. A "100 PD Club" was established to recognize firms in which there is 100% paralegal membership. A PD Online Store was created to have various PD products available such as apparel, mugs, bags and numerous other items. Annual Meeting was held in Fort Worth with a theme honoring First Responders. The Award of Excellence was awarded to Javan Johnson for her assistance in the Coordinator Transition Committee. TAPS was held in San Antonio with the theme of "*TAPS on Track—Journey to Excellence*." The PD partnered with the San Antonio Food Bank to raise money throughout the event to donate to provide meals to families in the Southwest area. Numerous 35th Paralegal Day celebrations were held across the state, and PD online merchandise included items with the 35th Anniversary logo. Mona Tucker was elected to serve as President for 2017-2018.

2017: Texas Forum was held in Austin with a theme of "Today's Legal Practice," and the PD trip took the travelers to Lucerne, Switzerland. Memberships and renewals became exclusively online, eliminating the need for mailing paper packets, and membership cards were issued in traditional PD

burgundy for one last year and only issued to new members thereafter. Annual meeting was held in Dallas, and the Award of Excellence was given to Stephanie Sterling for her work as chair of the Governing Documents Committee. A President's Award was given to Rhonda Brashears as PD Coordinator. Stephanie Sterling was elected to serve as President for 2018-2019. TAPS was held in Addison Texas with the theme "*TAPS Unmasked—Knowledge Awaits*."

2018: The PD annual trip took the travelers to Bruges, Brussels and Amsterdam in the spring of 2018. Annual meeting was held in Austin with a theme honoring legal support for the military. The Award of Excellence was awarded to Megan Goor for her work as *TPJ* editor. TAPS was held in Addison with a theme "*Just in Time for CLE—The Magic of TAPS 2018*." Donations were made to the Chris Kyle Frog Foundation by TAPS attendees and the PD. Megan Goor was elected to serve a second term as President 2019-2020.

2019: For the first time, the PD annual meeting was held in conjunction with TAPS, which was in Austin. The theme was "*There's No Place Like TAPS—20 years of CLE Excellence*"—marking the 20th consecutive year for the TAPS seminar. The PD webmaster since 2005 was retiring and transition of a new website was undertaken. The Paralegal Division released its first YouTube video, "Keep Your CLE Certificates" in the *Texas Paralegal Journal*. The "Paralegal Pulse" e-newsletter was revamped with a more formal look, content, and information from all district directors distributed monthly in a combined newsletter. The PD annual trip took the travelers to London for the second time. The Award of Excellence was awarded to Michele Boerder for her long standing dedication to the PD, and donations were given to the Austin Bar Foundation. A long-



Sara E. Dysart
Sara E. Dysart, P.C.
San Antonio, TX

Admitted to the State Bar of Texas in October 1981, I share this forty year anniversary of service to our legal community with the State Bar of Texas Paralegal Division. While the jury is still out as to how impactful my services have been, there is no doubt about the significant impact of the valuable services by the members of the SBOT Paralegal Division. As a speaker at the annual Texas Advanced Paralegal Seminar, I have experienced firsthand the division's organization ability and talent. Engaging experts in multiple areas of the law to present at this annual three day conference, the members of the Paralegal Division make all the participants feel valued and welcomed. This is just one of the many extraordinary contributions to our legal community by the members of SBOT Paralegal Division over the last forty years. Congratulations!



Heather Tessmer
Tessmer Law Firm
San Antonio, TX

Congratulations on reaching 40 years of great service and commitment to the paralegals of the great state of Texas! Can't wait to see what the next 40 years brings!

term strategic planning committee was appointed to assess ideas for the future of the PD on behalf of its members. Edna Garza-Guerra was elected to serve as President 2020-2021.

2020: As the rest of the world turned upside down with the onslaught of Covid 19—the PD rallied to continue serving its members. Board meetings were being held virtually. When it became apparent that TAPS would not be happening in person, a virtual version of TAPS was put together for the first time with speakers from all over the state. Annual meeting was again held in conjunction with TAPS—virtually. The 2020 Salary Survey was finalized. Susi Boss was elected to serve as President 2021-2022.

2021: And alas, we reach our 40th Anniversary year! A 40th Anniversary Committee was appointed to spearhead ideas for celebrations. The largest celebration was held in conjunction with TAPS in San Antonio in September with a theme “*With a Roll of the Dice and CLE for Everyone, TAPS is Roaring into 2021.*” Numerous Past Presidents were able to attend the annual meeting celebration. Two gifts were given to PD members—a lapel pin and a wireless desk charger, both with the 40th Anniversary logo designed especially for this celebratory milestone. Numerous celebrations happened both in person and virtually across the state for Paralegal Day. 40th Anniversary gear is available through the PD Online Store. The committee reached out to remaining PD members who were charter members and to all Past Presidents, and were able to gather some memories and articles for this publication. Lisa Pittman was elected to serve as President 2022-2023.

While the work of the Division has been vast over the past 40 years, this is a small sketch of what we have accomplished. The Publications Committee has put together a slide show that can be viewed [HERE](#) to commemorate our rich history. We continue to grow and move forward, enabling Texas paralegals to stay *empowered*, and to continue to advance in the legal profession and be the leaders across the nation with *Vision* to stay the leader across the country as we always have been!

We should each be empowered to reach out to every paralegal we know to become a part of this wonderful organization.

Javan Johnson currently serves as Chair of the 40th Anniversary Ad Hoc Committee, Chair of the TBLS Helpful Hints Ad Hoc Committee, a member of the Long Range Strategic Planning Committee, and an Ambassador. She is a Charter Member, a Past President for two terms, and has served the Division since its inception in numerous capacities. She is a NALA Advanced Certified Paralegal in Civil Litigation, and a Board Certified Paralegal in Civil Trial Law by the Texas Board of Legal Specialization. Javan is a litigation paralegal in Longview.



The dedication and passion of the State Bar of Texas Paralegal Division has been leading the way for 40 years! Congratulations on your successes and accomplishments!! Your commitment to the paralegal profession shines through in your great leadership. Keep up the amazing work! I can't wait to see what you have planned next!!

Lisa Lynch, CRP, CEDS
President, National Federation of Paralegal Associations



CAPA would like to wish the PD a
Happy 40th Anniversary!

Ariane Walton, President
President 2021-2022—Capital Area
Paralegal Association

Congratulations to the Paralegal Division of the State Bar of Texas on its 40 years of service to its paralegal members and the legal community. I am a proud member of the Paralegal Division which has provided me an opportunity over the years to meet and collaborate with other paralegals across the state of Texas. Thanks to the Paralegal Division, members are provided with valuable continuing legal education and networking opportunities, like TAPS, to support our career and leadership development. Happy anniversary to the Paralegal Division. May you have many more years of growth and success!



Debbi Lowe, President-Elect
2022 President
Dallas Area Paralegal Association



On behalf of the Fort Worth Paralegal Association, I want to extend our congratulations to the Paralegal Division for this auspicious occasion in reaching a 40 year milestone for Paralegals in the State of Texas. Happy 40th Anniversary!

The Paralegal Division leadership works to continue to grow our profession. The Paralegal Division has created a great network of Paralegals well versed in their fields, provided numerous opportunities for continuing legal education that we bring back to our respective offices to stay on top of the growing changes in our field. With the help of the Paralegal Division, we are the backbone of the legal community supporting our attorneys in the fight for justice.

I am honored to be a proud member of the Paralegal Division of Texas.

Susan Davis, TBLS-BCP
FWPA President 2021



North Texas Paralegal Association wishes The Paralegal Division of The State Bar of Texas congratulations on the wonderful occasion of your 40th anniversary.

Wishing you many more years of unparalleled success and stellar service to the paralegal community in the State of Texas.

Thank you for all the dedication and opportunities you have provided for the legal community these past 40 years. Happy anniversary!

Joncilee M. Davis, ACP—President



PRESIDENT'S PAGE

by Susi Boss, President

*"Do one thing everyday
that scares you" Eleanor Roosevelt*

What a great TAPS 2021 and Annual Meeting we had this year. For those who attended I hope you enjoyed the connection to old and new friends and learned from our esteemed attorneys and judges and in some cases the paralegals behind those attorneys. While smaller this year, we had a great time being together in San Antonio. You don't know how much praise we received from our vendors and speakers about how impressed they were with how we handled TAPS and how wonderful their audiences were.

The Division year is half over but what a time it has been. Great Board of Directors and Executive Committee and PD Coordinator. The hard work this group has put in so far has been awesome and yet we have so much more to give to our members during the next months of this Presidency.

Congratulations on 40 years for the very first Paralegal Division in the U.S. That's right the FIRST to blaze a trail for paralegals across the state and country. I am so proud to be a member of this organization and what it stands for.

"PARALEGAL PRESENCE" this is my platform and I am sure you are all already tired of hearing it but guess what, it's working. We have had such great recognition from the State Bar, attorneys and judges from all over who are seeing us (some for the first time) as the true strength in our legal field. The leaders and future leaders are with us or perhaps just need a little nudge from those who have been around the block with the PD.

We have dealt with COVID, and then another year of post-COVID and we have survived. Your PD Board of Directors and TAPS Committee and TPJ Editor and Paralegal Pulse Editor and all these great men and women who are giving their time and talent each year as Committee

Chairs, Liaisons, Standing Committee Chairs and Ad Hoc Chairs not to mention those appointed by the State Bar for specific Committees. These men and women have worked sometimes around the clock to make sure you have CLE and networking to assist in day to day issues and challenges every area of law has but you know what we need? We need you, those who aren't quite sure about stepping up to a local or state position. We need new ideas and thoughts and involvement from every member and for every member to encourage paralegals who aren't even members yet. Some aren't ready to step outside that comfort zone and need a little encouragement and there are some who believe that unless you are "certified" you can't be a member so its up to all of us to enlighten and make our presence known and I want each of you to help make that happen for the Paralegal Division.

The holidays have come and gone and even with 2022 being so new we see again a different type of year.

2022 is full of great plans to open up PD even more. Our first TAPS 2022 planning was held in January (Ft. Worth, TX next year); TAPA will be sponsored by DAPA in Dallas in 2022 (watch for more details), thank you DAPA for stepping up. This is a great coming together of all paralegal organizations from across Texas to come together in the spring to share ideas and goals; The Board just had its February meeting in Dallas. and if you have ideas, thoughts, concerns that you feel we need to discuss please contact your District Director, your President-Elect, Lisa Pittman and I am always available and want to know the good, the bad and the ugly so we can make things better as we grow.

Thank you all for allowing me the great privilege of being your President for 2021-2022. I hope you all we use my open door policy and reach out at anytime. I pause and reflect on the past six months of our year and can only say WOW you all have done it! I am honored and humbled for the opportunity to be your President

alongside some of the most fearless, loving and motivated men and women in the State of Texas. You never cease to amaze me with your wisdom, thoughts, ideas and most importantly your time to make this organization grow and flourish and bring to fruition "PARALEGAL PRESENCE" and that is withstanding all the COVID variances and other challenges we have had the past year especially.

Have a great 2022. Don't forget to open up the TPJ and Paralegal Pulse. You never know what new things might be in the corner of a page waiting to give you a bit more knowledge, encouragement or just a little chuckle. You might just win a gift card if you are the first to answer Javan's "Monthly Random Question". I don't know how many times I can say these are two GREAT places to find articles, CLE information for across the state; who our wonderful vendors are and how to reach out to them. Remember that our vendors support us and we need to support them.

We are in the process of President Elect nominations and voting with a new President Elect to be announced at the end of February. Our even-numbered District Directors are up for election. So is this the time YOU decide you want to make a difference and put your name in the hat? Run for your District Director, "MAKE A DIFFERENCE" and "MAKE YOUR PRESENCE KNOWN".

Now through February 28th is membership renewal time. Go online and renew your membership that may have lapsed due to our crazy past year(s). Come back to PD.

We have some great webinars that our Directors have been working hard to put together for MEMBERS ONLY. A great perk to renewing or being a first time member. Also, we were fortunate enough to have State Bar of Texas President Sylvia Firth speak to us on February 1st.

Susi Boss
President 2021-2022
Paralegal Division
State Bar of Texas



CELEBRATING 40 YEARS PARALEGAL DIVISION CHAIRS AND PRESIDENTS

Chair Kathryn King Richard (1982-1983) (1983-1984)	President Lisa Sprinkle, CLAS (1999-2000)	President Joncilee Davis, ACP (2012-2013)
Chair Elaine Peeples (1984-1985) (1985-1986)	President Javan Johnson, CLAS (2000-2001) (2006-2007)	President Misti Janes, TBLS (2013-2014)
Chair Cindy Mankus (1986-1987)	President S. Kristine Farmer, TBLS (2001-2002)	President Clara L. Buckland (2014-2015)
Chair Jan Soderman (1987-1988)	President Rhonda J. Brashears, CLA, TBLS (2002-2003) (2008- 2009)	President Erica B. Anderson (2015-2016)
Chair Cathrue Benoit (1988-1989) (1989-1990)	President Melissa Sherman, CLA, TBLS (2003-2004)	President Megan Goor-Peters, TBLS (2016-2017)
Chair Michele M. Boerder, CLA (1990-1991)	President Kim J. Cantu, CLA (2004-2005)	President Mona Tucker, ACP (2017-2018)
Chair Sharyn Aust Smith, CLA (1991-1992) (1992-1993)	President Ellen Lockwood, CLAS, RP (2005-2006)	President Stephanie Sterling, TBLS (2018-2019)
Chair Debra Crosby (1993-1994) (1994-1995)	President Patricia J. Giuliano (2007-2008)	President Megan Goor-Peters, TBLS (2019-2020)
President Sally Andress (1995- 1996)	President Stephanie Hawkes, RP, CIPP (2009-2010)	President Edna Garza-Guerra, TBLS (2020-2021)
President Melanie Villarreal, CLA (1996-1997)	President Debbie Oakes (2010- 2011)	President Susi Boss (2021-2022)
President Wendi Rogers (1997) (1997-1998)	President Susan Wilen, R.N. (2011-2012)	
President Ronald J. (Jim Buchanan) (1998-1999)		

***(View the 40th Anniversary
slide slow here.) Thank you for
volunteering your time and
serving as President!***



PRESIDENTS' RETROSPECTIONS



Michele Boerder, CP, TBLS-BCP (1990-1991) (Charter Member)

My minds-eye recalls clearly my very first Paralegal Division Annual meeting – at the Menger Hotel in San Antonio, Texas. I had joined as a Charter member of the Division shortly after its creation in October, 1981. I attended the meeting by myself, not knowing anyone (except a couple of familiar faces from Dallas).

Kathryn King Richards was Chair (then the position was Chair of the Board rather than President). She embodied professionalism, poise, diplomacy, and leadership. Her demeanor was warm and welcoming but also one of competency and control. I absorbed every impression – and, wanted to be a paralegal just like her!

The Division was newly formed, (the very first Division of a State Bar for paralegals in the U.S.) and the meeting addressed how paralegals should be defined and utilized. One of the first projects of the Division was to draft a Code of Ethics. There was an “Open Forum” at the Annual Meeting, and speakers (literally) lined up to voice their views at the microphone. We were in the midst of creating a new profession, and there was an environment of vibrancy, involvement and excitement.

Fast forward to 1990-91, when I was the person standing behind the podium. I had served as a Director, District 2 (Dallas), after my year as President of the Dallas Area Paralegal Association, then was elected as Chair of the Board (at that time we did not have a President-Elect position). Indeed, a differing landscape looking out into an audience(!) as opposed to looking up at the podium.

The accomplishment I feel most proud of facilitating during my year, is that of launching what became TBLS Specialty certification for Texas paralegals. This was another preserved “minds-eye” recollection in my Division memories.

It was at the Spring Board meeting, April 12, 1991 held in Brownsville, Texas. I can still see the meeting room and some of the people there after thirty years. The Division had investigated certification in several forms, and had held votes of the membership (a close membership vote not to proceed with a national association tandem test). But at this Board meeting, the conception of a specialty certification exam was developed, discussed and voted upon by the Board to move forward in that direction.

We discussed the idea of a Texas exam that would be substantive subject-matter specific. We worked until late that evening (as I recall around 11 pm) and then took a vote on a Resolution (see Paralegal Division History 1990-1991 on the website for the Resolution; the Resolution was then submitted to the State Bar.) My memory is that we went around the table to each Director to voice their opinion/their District's views. Specialty Certification was supported and we determined to form a Joint Task Force with the (then) State Bar Paralegal Committee. I was on that Joint Committee after my year as President. Justice Linda Thomas (Chief Justice, 5th District Court of Appeals) was the Chair of the Joint Task Force Committee on Specialty Certification for Paralegals. Her contacts with the Judiciary, the Bar, and TBLS (Gary McNeil, Executive Director), enabled the formation of TBLS exams for paralegals to happen in Texas. Again, another Texas FIRST in the United States, that specialty exams for paralegals were administered by the same entity that gave specialization exams to attorneys. With the support of the Bar and TBLS, the Texas Supreme Court, also in agreement, then amended the TBLS Plan to allow for voluntary paralegal TBLS exams. Thereafter, Board-Certified attorneys and paralegals worked to draft the exam contents, with the first tests offered by TBLS in 1994. (www.tbls-bcp.org)





In my view, the TBLS exams demonstrate (as the Resolution so stated), “to foster the professional growth, extended education in the law, and competent services to the legal community” which has been at the core of the Division’s purposes since our creation.

Indeed, now celebrating 40 years, the Division has been a key influencer, promoter, supporter of the development of paralegals in Texas and the nation.



Debra Crosby (1993-1994 and 1994-1995)

I became what was the last Chair of what was then called the Legal Assistants Division of the State Bar in 1993, after having been on the board since 1991. Under the by-laws that were in effect at that time, I could serve for 2 terms, and I did, retiring from my position and the board in 1995. After my term, the board put in place the current rules, allowing for the election of a president and president-elect.

When I joined the Division as a charter member in 1981, I never dreamed I would one day lead its board of directors. I went to the first Annual Meeting in Austin and was deeply inspired by the women who sat on its first board. They were true leaders of our profession.

I was so proud of our State Bar, being the first in the nation to create a division for paralegals, but I knew who was the driving force behind that. I knew it was those women who were sitting at the dais at that Annual Meetings, and others. I will always be grateful to those people.



I worked as a paralegal for over 35 years, in large and small firms. I always wanted to give back to my profession, so I served on the board that created the Alamo Area Professional Legal Assistants Association in San Antonio, and also worked on various committees for that organization. I got involved with the Division board when I was asked to run, as our current board member was leaving. So I did. I was intimidated by the women in the board, who were so efficient and knowledgeable. But I leapt in and got to work. I was amazed by all the work the Division did, and still does, for paralegals around the state and I was pleased to be involved.

During my tenure as Chair, we began providing our first seminars, and eventually began our support of the commission that would create the first specialty certification exams, via TBLS. I was proud to serve on that commission as well.



Once my tenure as Chair ended, I was asked to chair a long range planning task force to determine what issues were most important to the paralegals of Texas. We discovered that the paralegals were vitally interested in developing standards for their profession, so we set out to try to make that happen. Our task force worked for several years, forming a joint task with members of the State Bar’s Paralegal Committee, and eventually were able to get the State Bar to adopt standards for the hiring and utilization of non-lawyer staff. While these standards are optional, we nonetheless felt that we brought this issue to the attention of the State Bar, and to attorneys who had no idea that no such standards existed. It is still my dream to have standards in place that are enforceable, so that for a person to call him or herself a paralegal, both the public and lawyers would know exactly what that means.

I remain a member of the Division as an emeritus capacity. The Division will always have my support. Keep up the good work!



Sally (Andress) Hale (1995-96)

I was amazed to learn the Paralegal Division was celebrating its 40th Anniversary. Where has all that time gone? My term as the Division's first President (prior to that time, the office was referred to as "Chair") marked the beginning of its 15th year. Twenty-five years ago. I broke out that dusty box marked "Personal" from the basement and began the long walk down "memory lane."

Much to my surprise, I found numerous issues of the TPJ, including the one with my first President's Message. It started out with this quote from Will Rogers: "It makes no difference if you're on the right track, you'll still get run over if you don't keep moving." (So fitting for an emerging new profession and its impassioned leadership.) The goal of my tenure was to continue the momentum of the Division's future that had been created by visionary leaders since its inception in 1981.

Becoming an active member in paralegal professional organizations launched a huge turning point in my legal career. My decision to do so was inspired by some incredible paralegals, who were trail blazers for not only Texas paralegals, but for all paralegals everywhere. Texas is where it all started. While the idea of developing the paralegal profession had begun developing 10 years earlier, the State Bar of Texas was the first bar association to form a division specifically for Paralegals.

I retired nearly 12 years ago, so I can no longer reference the credentials earned while I was a practicing paralegal. But being among the first to be Board Certified in Family Law, and then achieving the title of Registered Paralegal by NFPA, marked the cornerstone for a successful 30-year career. My work with the Division empowered me to work on the national level. I served 2 terms as President of NFPA.

I am so proud to have played a roll in the growth of the Division. I remember when I turned 40. I truly believed that I have already made all important decisions in life. Looking back at that foolish mindset, I now know that the future of life after 40 is rich with opportunities and challenges.

Strength in numbers is key to advancing any cause. As a paralegal, your work often involves direct communication with not only paralegal colleagues, but also other support staff, and even attorneys themselves. The term "continuing legal education" includes educating not only other legal professionals, but clients as well.

I urge all members of the Division to reach out to non-member paralegals and encourage them to be part of the profession's future.

And...just keep moving.



Javan Johnson, CP, TBLS-BCP (2000-2001 and 2006-2007) (Charter Member)

I begged my high school vocational instructor to find a job for me with a lawyer. I was 15 years old. I had no idea why I wanted that, other than I thought the typical jobs offered to high school students in my small town were with a bank or other general clerical jobs, and a job with a lawyer sounded much more exciting. Lawyers had never been on the program's list, but my teacher found one that was willing to hire me. So began my journey. My mentor was his legal secretary. I adored her and absorbed everything she taught me. One day she told me our lawyers had received something from the State Bar announcing they were going to offer membership for a new division of the bar and it would be for "legal assistants." I had no idea what that meant, but it sounded really good, so the firm paid for us to join as charter members, and I had no idea where that small gesture would lead. I truly did not understand at the time what such membership even meant, or would ultimately mean to me.



I blinked and it has been 40 years. In that span of time our clerical secretary/assistant jobs have truly become a “profession.” The titles have changed and evolved to “paralegal.” We are the ones that made it so, along with attorneys that had the foresight to allow us to do more than type dictation. My attorney started asking me to do more and more on the cases – spending more time with the clients, drafting documents myself, preparing and organizing every aspect for the civil trials we handled and so much more. Then one day not too long after joining the Division, he called me from a trial he was in at the courthouse and said “you need to come – I do not want to do this alone.” There were a ton of exhibits and witnesses. I sat behind the ‘bar’ with the box of exhibits because no one, including the Judge, knew what to do with me, and I had absolutely no idea what was happening, but it only took a few short minutes for me to be hooked all the way.

In 40 years I’ve lost track of the number of trials, the number of exhibits, the hours of reading depositions, the zillions of hours drafting documents, all of the time holding the clients’ hands and so much more. What I have not lost track of are the professional relationships and friendships that have developed from my work with the Paralegal Division, and all of the wonderful knowledge and experiences that I have gained from my membership. I started from the beginning with subchair positions and worked my way into chairing various committees until the day I became President, then did it again!

I am so proud we – the Paralegal Division – have been the leaders in so many aspects of this paralegal profession. For those of you who have never really been involved, I cannot encourage you enough to step up to a different level and get on a committee, or consider running for the board of directors. And even if you do not want to do that, at least be vocal to your own district director and give them ideas as to what would benefit you as a member. This is how this brainstorm idea from 40 years ago to form this Division has helped mold the paralegal profession in Texas. Let the Division add the value to you that it has to me!



Rhonda Brashears, CP, TBLS-BCP (2002-2003 and 2008-2009)

I am happy to say that I had the opportunity to serve the Paralegal Division as President for two terms. My first term was 2002-2003 (during this term we were still the Legal Assistant’s Division of the State Bar of Texas) and my second was 2008-2009. During both presidential terms I found myself humbled by the board of directors trust in me to lead this historic association! The board of directors I worked with, during both terms, were some of the hardest working people I have ever had the opportunity to share a vision with. As every president who take office does, I had goals on what I hoped we, as a team, could accomplish and I can say the district directors stepped up! The comradery, the dedication, the pride in our profession and in the Paralegal Division is what makes us the Paralegal Division of the State Bar of Texas.

At the end of 2015, I was given the opportunity to take over the Paralegal Division Coordinator position after the retirement of Norma Hackler who filled the position for 20 plus years. I value the opportunity to still be involved in the growth of the Paralegal Division!

Happy 40th Anniversary Paralegal Division, I wish you many, many more!



Melissa Sherman (2003-2004)

A great deal of work focused on carving out an identify for paralegals as a profession separate and distinct from other roles in a legal office. Courts started including paralegal hours in awarding legal fees and organizations in other states were watching what Texas was doing. I was able to represent LAD in North Carolina, speaking to paralegals during their State Bar meeting and share the work Texas was leading.



The women and men I worked with in the Division were intelligent, motivated, individuals and in spending time with them, I learned a tremendous amount about leadership, coming together to achieve a purpose, and professionalism. I continue to draw from these lessons to this day and I have a tremendous respect for each and every one of these great Texans!

Patricia Giuliano (2007-2008)

I was honored to be elected to serve as president of the Paralegal Division. During my tenure we continued the work of our predecessors in forging a strong relationship with the State Bar and educating the legal community about the benefits of adding a professional paralegal to their staff. I learned a lot from my fellow Board members and gained some lifelong friendships.

Debbie Oaks McBride (2010-2011)

Congratulations to the Paralegal Division of the State Bar of Texas on its 40th Anniversary. It was an honor and privilege serving as President of this great organization. The State Bar of Texas, the Paralegal Division and all of our members continue to be trailblazers during very important shifts in the profession. I look forward to seeing where we go next.



Susan M. Wilen, RN (2011-2012)

Serving as President of the Paralegal Division of the State Bar of Texas was a tremendous honor, but it was also a year of hard work. The experience was survivable because of all the support and counsel I received from Norma Hackler, Debbie Oaks McBride, my immediate Past President, the members of my executive committee, the District Directors, and the many different support staff of the State Bar who availed themselves to me whenever needed. I learned valuable skills and hard lessons about being a leader.

More importantly, the friendships that were forged during my tenure remain a constant source of joy and strength long after my term ended. These individuals are an ongoing reminder of the powerful connection of shared vision and willingness to do the hard work of something bigger than ourselves. Their laughter and kindness will never be forgotten.



Joncilee M. Davis, ACP (2012-2013)

It is hard to believe that it has been almost ten years since I had the honor of serving as President of the Paralegal Division. Writing this statement brought back so many amazing memories for me, as I am sure each of you have from your tenure with the Division. I remember toiling over a theme for the year for our members, and finally decided to incorporate the novel "To Kill A Mockingbird" to mirror our year. Several characters from the book were used to demonstrate the stages of being a paralegal (Boo Radley and Scout Finch) and how attorneys can be an influence on us and our ethics (Atticus Finch). Executive Director Norma Hackler, CMP was a sounding board and source of guidance. She helped me envision what I wanted to accomplish during the 2012-2013 year.

I am very proud to say that the 2012-2013 year was full of lots of accomplishments. We really nurtured and grew our Facebook and Social Media presence during that time, including a page for the Texas Advanced Paralegal Seminar. Traffic on Facebook and Twitter substantially increased, and we reached paralegals across the state, as well as in other parts of the country. On a personal note, I learned to "tweet." The PD Blog started



during that time as well! The Board began investigating the need to make the Texas Paralegal Journal digital and possibly starting an application for the TPJ for the iPhone/iPad. That year, I appointed the TBLS Helpful Hints Guide Ad Hoc Committee and with the help of many TBLS Certified Paralegals across the state, we began drafting the guide as you know it today! The Board also adopted the first formal definition of Pro Bono work.

Just as Scout knew the importance of education, so does the Division. That year we had a special Ad Hoc Committee on Paralegal Programs and Education. The committee researched the various programs available across Texas, as well as some nationally which were online. They authored a very detailed report about which programs met the criteria for membership into the Division. We learned much from the committee and about paralegal education.

There were many new additions to the Board of Directors that year, so it was a year of growing the upcoming leadership of the Division. During Board meetings, we had leadership and growth activities.

The PD Trip for 2013 was to Scotland. While the twenty-eight travelers never did find Nessie the Loch Ness Monster, we enjoyed a trip of a lifetime. We visited Glasgow, Inverness, the Scotland Highlands, and Edinburgh. We spend time in many castles, including Urquhart, Blair, Hamish, Stirling, and Edinburgh. Don't forget it is pronounced "Edinbro?" One of my favorite memories was our first night welcome dinner on the rooftop terrace with the sun setting, a glass of prosecco, and 27 amazing people.

The 2013 Annual meeting was in Dallas that year. I was lucky enough to have my mom, uncle, and best friend attend the luncheon. The encouragement I received from my family and friends outside the legal community was truly amazing and I could not have done it without them! It really does take a village.

Here is my story of how I became involved the Division. In 1998, I was working on a large personal injury case and there were two different firms working for the different Plaintiffs. The other firm hired a new paralegal to work on the case, and we immediately formed a great working relationship. We went to lunch one day, and she told me about the Paralegal Division (then named The Legal Assistants Division) and how much she enjoyed volunteering for them. She handed me an application and told me I would be a great volunteer and that she already has an opportunity for me. Once I was accepted as a member, I was immediately asked to volunteer for District Two for the Membership Committee and serve as Sub-Chair. Wendi Rogers was that paralegal. I did not learn she was President until several months later. She simply navigated and encouraged me along the path. Unfortunately, Wendi is no longer with us, but her legacy as a mentor continues to live on. Via leadership opportunities, mentors, and networking, I worked my way up and learned about the Division in the process. If you are interested in volunteering with the Division, please don't be shy, like Boo Radley. But rather, raise your hand and jump on board for a wonderful ride.

Being a volunteer for the Paralegal Division has helped me grow both professionally and personally. I have met amazing and inspiring legal professionals across this great State of Texas and I have made lifelong friends. Through networking, I have found several different paralegal jobs and have gotten to grow as a paralegal at each firm by learning from different attorneys and other paralegals. Through mentoring, I have had a first-row seat watching and guiding some of the current and upcoming leaders as they began their journey with the Paralegal Division. Likewise, I am thankful to the mentors who have helped me along my way. While too many to name individually, they know who they are!



Happy 40th Anniversary Paralegal Division! I have witnessed so many accomplishments in the past 23 years since I first volunteered, and I cannot wait to see what the future holds!



Clara Buckland, CP (2014-2015)

Hi, I'm Clara Buckland, the 2014-2015 PD President. I served the Division in several capacities including District 16 Director for two terms (2006 to 2010), Secretary (2007-2009) and Parliamentarian (2009-2010) on the Division's Executive Committee. I also served as Chair of the Membership Committee from June 2012 to June 2013, the same year I was elected as the 2013-2014 President Elect.

My year as PD President taught me many things about me and others. I learned what it takes to pay attention to every detail in the running of an organization such as the PD and how invaluable the willingness to give of one's time and talents is, in the service of others. There are many individuals out there who are just starting their paralegal career, and if we can help by providing guidance and sharing our knowledge and experience about our profession, we play a part in not only helping develop stronger, more informed paralegals, but strengthening the profession.



Megan Goor-Peters, TBLS-BCP (2016-2017 and 2019-2020)

I had been a member of the Paralegal Division before 2015, but, as an already seasoned paralegal of over 30 years, working for a high-demand litigation firm, I did not think about becoming involved. Mainly, I joined the Paralegal Division to receive the Texas Paralegal Journal and to get a discount on my SBOT CLEs. My involvement changed in 2015 – all due to a mistaken e-mail address for me on the SBOT list. My dear friend and colleague, Michele Rayburn, reached out to me about the e-mail address and we talked more about the Paralegal Division, which later led me to apply for a director vacancy that had become open. The Board approved it and I have been involved with the Paralegal Division ever since, including not only serving as Director, but as a volunteer for community service programs, various committee chairs, and being elected for two different terms as President of this great association. During the first term, Rhonda Brashears became our new Coordinator after Norma Hackler had retired after 25 years as the Paralegal Division's first coordinator. Rhonda and I learned together about how to keep the Paralegal Division on its feet; the Texas Paralegal Journal transitioned from print to totally digital; memberships transitioned from mailing bulky packets with colored-coded forms every year to becoming exclusively online; membership cards were mailed one last year in traditional Paralegal Division burgundy to be discontinued from being mailed annually; the "100 PD Club" was created; and the PD online store was created. The second term involved having Annual Meeting in conjunction with TAPS to encompass more members in the attendance; the transition and development of the new website from the retiring webmaster of over 14 years; and a more formal format of the "Paralegal Pulse" was created with news included from all of the districts. In addition, student liaisons were appointed throughout the state to help reach out to our student membership. District Director 16, Becky Lopez, also helped in that goal by having class video conferencing with Paralegal Division representatives and paralegal students. (This was before Covid and Zoom meetings were even known.) The spot audit CLE performed by the Paralegal Division is a necessary and vital function in order to ensure that our members are compliant with the CLE requirements of the Paralegal Division and Texas Disciplinary Rules of Professional Conduct, Rule 1.01, Comment 8, which also affects the paralegal profession. To assist the spot CLE committee chair with one of the most common items encountered with auditees - to provide support for claimed





CLE - a campaign to encourage members to “Keep Your CLE Certificates” was launched. Sustaining member, Sam Beaman of Veritext, donated the talents of videographer Will Rain, and, with the assistance of PD member Susan Davis and Jon, an artist at Bonehead Tattoo, filmed my vision, the “Keep Your CLE Certificates” YouTube video that was featured in the *Texas Paralegal Journal*.

Happy 40th Anniversary Paralegal Division! Needless to say, I wanted to make the best of the time serving the Paralegal Division and was very, very fortunate to serve with a group of active, mindful, and engaging directors and members along the way. The terms were very challenging, but absolutely rewarding. Both Boards of Directors were extremely hard-working and we always had the common goal – how to improve the benefits and inspire empowerment of the membership of the Paralegal Division and paralegal profession – in the forefront. My regret is that I did not get involved with the Paralegal Division sooner and would strongly urge and encourage paralegals, new and seasoned alike, to get involved.



Mona H. Tucker, ACP (2017-2018)

I was President in 2017-2018. I am a NALA-certified paralegal and hold two advanced certifications (ACP). My theme for my Presidential year was “Leadership”, and each month, I sent an encouraging email to my Directors. As I said in one of my emails:

I was asked the other day how I would describe my leadership style. The question caught me off guard, and I had to think about it for a minute. What I came up with was the word “encouragement”. Maybe that doesn’t sound like a forceful style, but then, maybe I was put here on Earth to be a cheerleader. I strongly believe in giving people the tools they need to work with, and then getting out of the way and letting them do their job. I’d like to always be the one who says, “You are good enough.”

We began my term with 1,445 members and ended with 1,671. During my year, the PD was invited to be involved in developing the State Bar’s new Child Protection Law Section. I participated in some of the phone calls, but appointed Stephanie Sterling to spearhead our efforts, and she did an excellent job. I was privileged to attend the Council of Chairs meeting in Austin, as well as the TBLS induction ceremony.



Edna W. Garza-Guerra, TBLS-BCP (2020-2021)

As we already know, Texas was the first State in our country to create a Paralegal Division in conjunction with its State Bar so let’s continue to celebrate the “40th” Anniversary of the Paralegal Division – State Bar of Texas with great pride and a continued sense of accomplishment. In retrospect, Paralegals have made great strides in the last 40 years by way of education, experience, board certification, public service, and professional recognition in the legal community so let’s also thank all the founding Paralegals that helped in the formation of this professional organization that has continued to flourish and grow to date. It is because of their vision that we continue to enjoy the fruits of their labor.

This professional organization continues to teach me about professionalism, public service and leadership. It with great passion and conviction that I attest to being a “proud” member of the Paralegal Division. And I was even more proud to serve as your 2020-2021 President, a realized dream and a very humbling experience that I will always cherish. You see, serving in this capacity taught me the value of hard work, commitment, dedication and leadership at an even bigger level – a statewide level. The PD is always looking for new members to step out of their comfort zones and do their part to continue to make this professional organization an even better one. Step out of your comfort zone today and step up to a position of leadership in the PD because you can make a difference!



PARALEGAL DIVISION STATE BAR OF TEXAS COLUMN ON ESTABLISHMENT IN 1981

by Thomas L. Hanna

Forty years. You have asked for my recollections of forty years ago when I can't remember where I put my cell phone. So, with apologies to Eugene O'Neil, here goes *A Long Day's Journey into Night*.

WE WERE HEARING STORIES.

I wish that I could say that the idea came in a great epiphany with visions and crashing music. Things that last are seldom done on a whim. There had been a Committee on Legal Assistants since at least 1979. Its primary activity had been to define the activities which a legal assistants could preform without the supervision of an attorney. I found a quote by Chrys Dougherty, then president of the State Bar, to the Committee on Legal Assistants on September 15, 1979:

"Lawyers are constitutionally unable to delegate responsibility. . . There were times when people wrote pleadings by hand. Now the profession is more complex and the legal assistant has to be recognized. . . (But) it moves with the jet speed of a glacier."

The glacier began to speed up in 1981. Buoyed by an investigation of state and local bars by the Federal Trade Commission for suppression of the right to practice law, schools and training institutes sprang up across the state to train paralegals. One, just down I 35 from Austin solicited enrollment promising that the graduates would be "licensed" as paralegals and were virtually guaranteed

jobs in "this booming market."

Those caught the eye of Bob Towery who was a senior CLE planner at the State Bar. Bob had also been a liaison to the Committee. We began to talk about the false advertising promising a license and jobs when neither existed. We involved the General Counsel's office to research whether or not we had jurisdiction to sue.

WHAT TO DO.

Gradually Bob's and my thinking moved to how we might formally recognize this new and growing profession.

A committee just did not seem adequate as it would always be a Bar committee. Sections were reserved for licensed attorneys. We needed something that was of the Bar, but for the Legal Assistants. We wanted them "in the tent."

In 1978 I had convinced the Board of Directors to create a Law Student's Division to involve law students with the Bar prior to their being licensed. It was the first ever Division at the State Bar. Could we convince the Board to approve one for legal assistants? Paralegals? Super Secretaries? We didn't even know what to call them. I take some consolation that we still don't.

We decided to give it a try.

Bob got the laboring oar of seeking the assistance of legal assistants across the state and getting their input and support. Sandy Hardin became part of the team. I had to sell the idea to the officers and Board.

OCTOBER 23, 1981.

This was to be my last Board meeting as I had accepted an offer to return to

practice in Beaumont. I felt that I had the votes to overcome the resistance of those who felt it was outside the Bar's jurisdiction. My remarks when the item was presented centered on the changing face of the profession and the necessity to involve trained legal assistants in providing legal services. I pointed out that it would enable the Bar's excellent CLE department to see that training being offered actually prepared the graduates for employment by law firms.

The Board agreed.

It was the first legal assistant's division of a state bar in the United States.

POSTSCRIPT.

Within a week I was practicing law again with several of its charter members. Jeannie Grinnell, Prue Nicholas and Sue Patterson come to mind.

Lamar University in Beaumont and Port Arthur redesigned their training programs with the input and assistance of members of the Division. The private training "schools" went away.

My tenure with the Bar had lots of highlights, lots of success. Surviving the first Sunset Review. Passing a referendum to pay off the Law Center. Passing a new State Bar Act. None have lasted as has the creation of this division. I take pride in what you have done, in what you have become.. Bob would second that if he were here to edit this article..

And, now I not only work with them—I have one in the family. Life is good. And, call me when you celebrate your 50th.

Tom Hanna

It is with a heavy heart and great sadness that we share that Mr. Hanna recently passed away. We are honored that he recently provided a submission for this anniversary edition. We will forever be grateful for his belief and support he has given the Paralegal Division and the paralegal profession.



THE GENESIS OF THE PARALEGAL DIVISION OF THE STATE BAR OF TEXAS:

A Tale of Three Who Made it a Reality.

by Sandy Hardin

As true in many accomplishments and milestones throughout history, it takes the right people, in the right place at the right time. And so, it was in 1981 with the establishment of the Paralegal Division of SBOT. Texas was the first state bar in the nation to do so, and research indicates that it may be the only division of its kind that exists today.

This vision began with Bob Towery who was the Director of the Professional Development Department of the State Bar of Texas. He was an avid supporter of the Legal Assistants Committee as it was called in the 1970s. It was composed of Lawyers and Legal Assistants and served as a launching pad for the formation of what was to become the Paralegal Division of the SBOT.

Bob worked tirelessly in drafting the legal documents/bylaws and would run

them by the SBOT Legal Department. This process seemed to go on for months until the legal foundation for the formation of Paralegal Division was ready to be approved by the SBOT Board of Directors. During this arduous process there was a key ally, Tom Hanna, who was President of the SBOT.

An Annual Forum brought together key forces that would eventually create SBOT Legal Specialization exams for paralegals. This would follow the same format as Texas Board of Legal Specialization for Lawyers. The Annual Forum was comprised of SBOT Legal Assistants Committee, Paralegal Educators from Texas universities and colleges, Paralegal Division Board of Directors, and members.

Long time strong advocate for Paralegals, Justice Linda Thomas,

spearheaded the effort to achieve approval by the State Bar Board of Directors. Specialization committees were formed for the various areas of law to draw up the exams. The first specialty exams were administered by the Texas Board of Specialization in March 1994.

There is also much credit due to the many dedicated professionals both lawyers, paralegals, and SBOT staff behind the scenes who played key roles in bringing this all to fruition, but these three were the key to success. It was a privilege for me to know them and work with all three of them.

Congratulations to you all! I am so very proud of and excited for all of you on this, your 40th anniversary!

Closing with fond memories!
Sandy Hardin

PARALEGAL ETHICS HANDBOOK

The Paralegal Ethics Handbook is a resource for all paralegals, attorneys, and members of the legal community that addresses ethical considerations for 17 practice areas, as well as considerations for in-house, corporate, freelance, administrative, governmental, and regulatory law paralegals. The PEH:

- Examines topics such as defining ethics, ethical obligations, and remaining ethical;
- Addresses ethical considerations for e-filing, e-discovery, and technology;
- Provides resources for state information and paralegal association ethics cannons, plus related information; and
- Contains rules and regulations for all 50 states and Washington, D.C.

The PEH explains how to determine whether an action may be an ethical violation.

Authored by Paralegal Division members, with input from the legal community. Published by Thomson Reuters.

<https://tinyurl.com/txpdPEH>



www.txpd.org



WELL-WISHES FROM CHARTER MEMBERS

Cecile N. Wiginton, CP

40 years! How time flies when you are having a good time! It was a proud day June 1, 1982 to become a charter member of the newly formed Legal Assistants Division of the State Bar of Texas now rightfully named Paralegal Division. That began my quest to promote, educate and enhance my career in the law business and encourage others to join the ranks. I began my legal career in 1965 for a solo practitioner where, thanks to a brilliant woman, I learned the ropes of the law office. I later worked with the law firm of Turpin, Smith, Dyer, Saxe & MacDonald in Midland for the senior partner who was Board Certified in Oil & Gas Law and active on State Bar committees. He was a huge mentor and encouraged my decision to become a paralegal. I learned the State Bar of Texas was forming a Legal Assistant Division and immediately signed up with the blessing of my attorney mentor. The rest is history. I sat for the exam and became a NALA Certified Legal Assistant, now designated Certified



bar paralegal division in the United States! In 2005 the name was changed from Legal Assistants Division to Paralegal Division in the effort to better define our work and worth to the attorney. A new paralegal definition and standards were adopted by the State Bar of Texas.

It has been my privilege to serve the Division as Director for District 11 from 2003-2007, Treasurer from 2006-2008, Continuing Legal Education Co-Chair in charge of Online CLE from 2006-2008 and recipient of the Division's Exceptional

Paralegal. The State Bar of Texas was a trailblazer when on October 23, 1981 it established the first state

Pro Bono Service Award in 2006. With its purpose being to promote professionalism and education, the Division has grown to provide an amazing continuing legal education program, which is key to our profession, with its annual three-day TAPS seminar, an E-Group resource for members, the publication of a handbook on ethics, a mentoring program, and did I mention —lasting friendships forged along the way. In 2005, the State Bar approved a definition of “paralegal” and the Texas House passed House Resolution No. 865 declaring October 23 as Paralegal Day in Texas. Our Board of Directors has worked hard through the years to define, refine and enhance the paralegal profession in Texas. The Division is the key to promoting our profession. Membership lends credibility to our profession because of the standards set by the Division. Here's to 40 more years of success!

Lisa Stewart

As a paralegal and a member of the State Bar of Texas Paralegal Division, I am humbled and honored to be included in the distinguished group of charter members. My career has challenged me and rewarded me beyond what I could have ever expected. With this milestone year, I must thank my firm of 26 years, Langley & Banack (“L&B”). After beginning my career with an eclectic array of work, L&B provided me with an exciting opportunity to delve into real estate loan document drafting and preparation that kept my job interesting and challenging for many,



and I am eternally grateful. I have built a professional relationship with my team at

many years. While it has not always been perfect, my supervisors and colleagues have stood by me through both personal and professional challenges

L&B based on hard work and trust. Their daily appreciation of my skills, along with their faith in my abilities, has been invaluable. I would encourage anyone who wants responsibility and continuous education in the legal field to pursue being a paralegal and to look for a firm that you respect as much for their collegiality and professionalism as you do for their legal brilliance. Even after 40 years, I still want to go to work every day and for me, that is what makes a job perfect.



Sharon Kratochvil Bradford

I have been a paralegal since 1978 (43 years). My chosen area of practice for the past 31 years has been exclusively family law. I live and work in the DFW area. I have been Board Certified by TBLS since 1998. I was certified by NALA in 1982. Most of us charter members are either nearing the age of retirement or may have already retired. I was the initial Director from the Amarillo area. It was an exciting time for our profession—a time where we were first being really recognized for our contributions in the legal field. We chart-



related documents. I was actually preg-

ed new territory those first couple of years. We worked diligently drafting the first by-laws and

nant with my first child during that time and was traveling to Austin for our Board meetings. Our profession has grown substantially during these 40 years! Board Certification came into existence. I have had the privilege of meeting and working with and against many excellent paralegals over the years. Each of us makes a difference to our attorneys and to our clients through our work. It is important for all of us to continue to put forth our best effort every day and to exhibit the utmost professionalism.

Sharon Cates

When I started, it was on a selective typewriter with multiple copies. When you got finished, you walked 10 blocks to the courthouse to stand in line for court assignment. If you didn't like the court, just step aside then wait (and sometimes wait and wait) for a court you were familiar with. From then it went to mag cards. When computers came along,



I embraced it. Had one boss who did complicated documents. He would take a paragraph out of page 102 and inject in page

67 (maddening). Computers changed that fiasco.

But what I received from Paralegal Assn was constant CLE and support from my fellow paralegals.

Congratulations to my fellow Paralegal Division members.

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Inflation is here. How should I respond?

By Mitchell Byrum, CFP

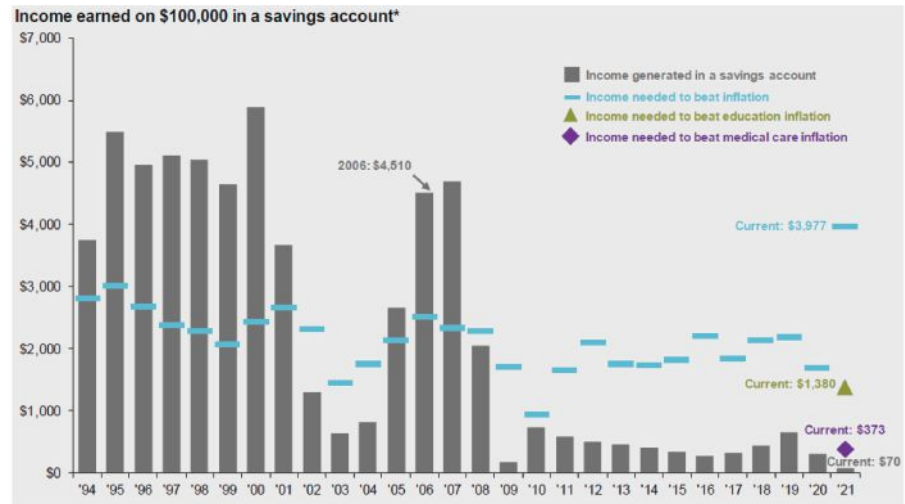
The talking heads can't stop talking about it: Inflation. While much of what the "news" says is exaggerated, lacking context, and meant to keep you coming back for more, there is no denying we are experiencing higher inflation than what we have experienced in a long time. You have probably noticed the grocery bill go up or that it costs more to fill up your car recently. Small business assistance through PPP loans/grants, stimulus checks, and Federal reserve bond buying have all lead to a dramatic increase in the number of dollars in our economy. Add to that our historically low interest rates and supply chain issues stemming from the economic shutdown in 2020, and you have a classic recipe for inflation. Everything I just listed as a cause for inflation is probably out of your control, so how should you respond?

1) Focus on what you can control

Dallas Cowboys legend Emmitt Smith tells a story about the best money advice he ever received, claiming it was from non-other than Cowboys owner Jerry Jones:

"He taught me about finances with a simple statement. He always said, 'Have a big front door and a small back door. Take in as much as you can and spend as little as you can.'"
—Emmitt Smith

While simple, that philosophy is the perfect example of easier said than done. With a steady income, saving money is very doable, but the temptations of going out with friends, buying or leasing a nice new car, or anything else that doesn't contribute to the goal of financial independence is only going to be more costly and painful with rising inflation. I'm not saying don't buy nice things, don't enjoy time with friends, or go on nice trips. I am saying to focus on what you can control by creating a spending plan and sticking to it. Budgeting for those "fun" things helps



you keep spending in check and creates the freedom to enjoy those things because you know they are part of the plan and not preventing you from building wealth.

2) Don't try to time the market

The desire to liquidate holdings or invest funds when you believe something is going to happen in the short-term rarely proves to be an effective strategy. There are many times in history that headlines could make one weary of investing, but hindsight shows us that people sitting out of the market experienced significant opportunity cost during many of those times. To successfully "time the market" you must make two great calls; when to sell and when to buy back in. Individuals rarely make both those calls correctly. A study published in the February 2001 issue of Financial Analysts' Journal, titled Market Timing and Roulette Wheels, tested and compared the results between the market timing and buy-and-hold strategies. The authors studied data from 1926 through 1999, in an examination that included all six major U.S. asset classes. The objective: To determine whether market timing was an effective strategy. This study was revisited in 2012. They analyzed a variety of monthly, quarterly, and annual mar-

ket timing strategies, producing more than one million possible market timing sequences with more than one million different outcomes. Each of these outcomes was compared to the buy-and-hold strategy for the same time period. The study of a million-plus investing scenarios concluded that the buy-and-hold strategy beat market timing 99.8% of the time.

3) Don't sit on excess cash

One of the most painful parts of experiencing inflation is seeing the purchasing power of your dollars go down. Compounding this issue is the fact that checking accounts, savings accounts, and even CDs all have historically low interest rates. The chart above illustrates this.

It's evident that through much of the 90s, and even some of the mid 2000s, it was possible that cash in the bank could have earned enough to beat inflation. Since interest rates were lowered in response to the financial crisis in 2008, we have never returned to a point where you could make enough in the bank (the gray bars above) to outpace the cost that your living expenses are going up (the blue lines above). Of course, your emergency fund and money for anticipated upcoming

expenses should be kept in cash. However, investing for the long term has been one of the best ways to keep pace and sometimes exceed inflation over time for the money you will need in your later years. Does this mean we recommend putting all your money in the stock market then never touching it again? Absolutely not, as plans need to be adjusted to your goals and risk tolerance over time. However, we believe a well-thought-out diversification strategy and periodic rebalancing is still the fundamental basis of a good investment plan. In times of uncertainty, sticking to a disciplined investment approach utilizing strategic, diversified asset allocation will hopefully allow you to benefit the best days in the market that can be critical to a portfolio's long-term performance.

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Mitchell Byrum can be reached at mitchell@harrisfinancial.com



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Behind the Digital Curtain of the Paralegal Division—Len Hardin and David Timmons

by Megan Goor-Peters, TBLS-BCP

Two people who have always worked diligently in the background for the Paralegal Division are Len Hardin of Camden Place and David Timmons of David Timmons Design. They are long-time and essential parts of the Paralegal Division's history and deserve recognition.

Len Hardin / Webmaster

Len Hardin is our website developer since 2005. I know that is not grammatically correct when I say "is" because, although he officially retired from doing work for the Paralegal Division in 2020, he is still there for any guidance or questions.

I initially met Len through e-mail communication when I became the District 3 Director in 2015. Then, when Norma Hackler, the Paralegal Division's coordinator of 25 years, retired in 2016, as President, Len and I communicated more frequently to help understand the website management aspects of the coordinator's position to assist in selecting a new coordinator. In 2019, Len gave the Paralegal Division his notice of retirement. I was a part of the ad hoc committee and regularly worked with Len concerning the transition to a new website developer that transpired the following year.

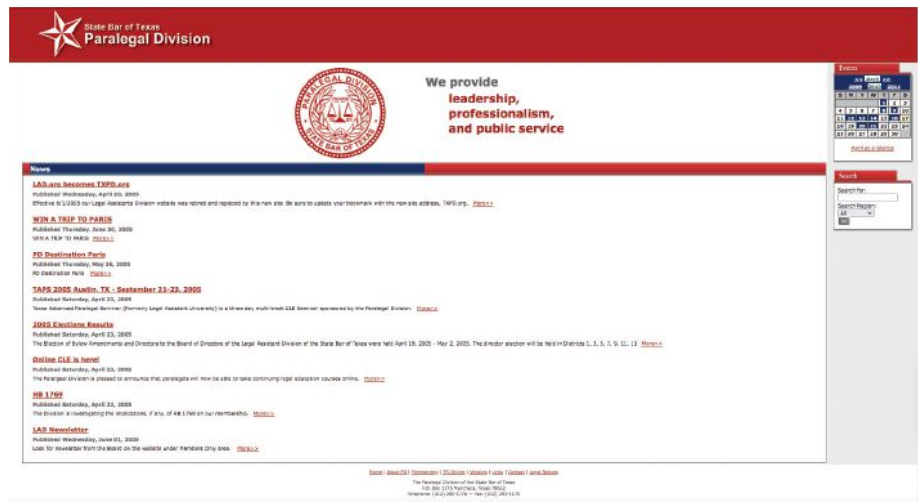
Since 2005, Len branched out and did website management for eleven other paralegal association websites across Texas. I am willing to bet that your local association was handled by Len. The Paralegal Division's former coordinator, Norma Hackler, met Len in person years ago when she visited Atlanta, but no one else has personally met or even seen Len. Len has only been the calming, friendly, and helpful voice on calls or through e-mails. Even now, with Zoom meetings more commonplace, they too are met with the word "len" being on the screen – no photo, including this interview which was by Zoom.



Len Hardin is originally from Atlanta. He was pursuing a degree in electronics and worked at Savannah Electric and Power for a short period of time before joining the U.S. Air Force. He was stationed at a Strategic Air Command (SAC) base in Columbus, MS, and tested for the computer industry. This led Len to work for the Joint Chiefs of Staff for the Pentagon in a war-ready computer room for two years. After his military service, he worked 25 years for Bell South (Southern Bell at the time) in Atlanta, where he met

his wife, Liz, who was also in IT. Len and Liz just celebrated their 39th wedding anniversary last January. They have two children - their son, who is a Captain of the Fire Department in the Charleston area, and their daughter, who is in the Atlanta area. They have eight grandchildren, ranging from 17-27 years, and one great-grandchild.

In 2000, Len retired from Bell South and started Camden Place as a retirement endeavor with his son-in-law. Originally, they did records management for various corporations. Basically, this involved setting up rules and regulations on how the company deals with records and retention schedules. This involved compliance with a huge amount of varied government regulations (federal and state) for these corporations. Len would consult with corporations about protocols on what to do with record management and audits. His son-in-law continued with a larger company to consult with the legal departments of various corporations. Len continued with Camden Place performing computer-based and website management, not so much for the money, but an interest that he enjoyed doing.



The Paralegal Division had its original website at www.LAD.org in 1999. The person assisting with the website at that time had a full-time job and could not meet the growing needs of the Paralegal Division. In 2005, Norma got in contact with Len. Len redesigned the website to a content management system (CMS) so Norma could do a lot of day-to-day business-type changes herself to meet the increasing demands of the growing Paralegal Division.

In 2005, the internet was barely in existence, and code was the norm for creating websites. As you can imagine, "code" means an entirely different animal in the website development world today. There were no "plug-ins" or "short cuts," and every minor action, design, function, etc. was written in thousands and thousands of lines of code. The Paralegal Division's website is a true example of a highly committed and task-oriented website. The website performs several significant and sophisticated functions for the organization, including membership, publications, the TAPS conference, and so much more. It pales in comparison to many modern-day websites regarding the extraordinary functions and purposes that it serves. "It is a very complex system- mission critical" is how Len describes it.

What can you say about your industry then and now? "From an IT standpoint, there is no comparison; everything was handwritten. When things first started, they were hand-cobbled together with a few included utilities, but if you needed a directory, who had access, and other functions, you coded it. These days, they are plug-ins that are free. The downside is you get what you pay for. Free plug-ins give basic functionality, but frequently need to upgrade if you want additional functionality. For our website, it is very complex, but you can see how well the functions work and play together and how to integrate with other things in the website."

"Our website is a little old-fashioned in that it is laid out in the one-page format." And although the Paralegal Division's website is complex in the background, "for a big website like ours, we use the simplistic approach for our busy audience without the necessity of an endless amount of



Much to my surprise, since our interview I received this photo of Len!

scrolling."

Nowadays, you may catch Len and his wife playing couples tennis (him not so much now, but Liz still does, whom he claims is much better than him) and every year skiing west of the Mississippi on the blue cruisers trails (although rumored that he skied the blacks in the past). Len also spends time with a small group playing poker every week. And even now, without fail, Len will pop up to assist and volunteer his time and guidance with "our" website when in need.

"The Paralegal Division has been influential and instrumental in moving the paralegal profession forward for the State of Texas. I would think that if the Paralegal Division is not the premier organization in the Nation, I do not know who would be."

— Len Hardin

David Timmons / Graphics Artist

It would only be fitting to share the story of the other staple of the Paralegal Division, our graphics artist, David Timmons, who handles the production of the *Texas Paralegal Journal*. David has been the graphics artist since the *TPJ* was started in print format and then through the digital production, which began in 2016. David and I starting working together when the *Texas Paralegal Journal* was transitioning from print to exclusively digital in 2016. Although we would only "meet" by e-mail four times a year, it is

usually a whirlwind each session to put together the edition to meet the Paralegal Division's deadlines. David, too, is a person I have never seen, but he provided a photo for this article and agreed to let us tell a little bit about him.

David Timmons – the other person behind the digital curtain of the Paralegal Division.

David Timmons was born in El Paso, the third child of Bill and Laura Timmons. His father was a history professor at the University of Texas at El Paso, and his mother was a homemaker and fabulous cook. He loved growing up in the desert. David says, "There was a wonderful blending of cultures and ethnic diversity—Hispanics, Arabs, Anglos, and Jews—everyone got along." If David is not working, he is gardening or conquering a *New York Times* crossword puzzle.

David is a graphic designer, doing primarily print publications, interiors and covers. He works on a lot of university press books, book covers, museum catalogs, and journals. He imports edited files and images and tries to get them to work together to create a coherent experience for the reader.

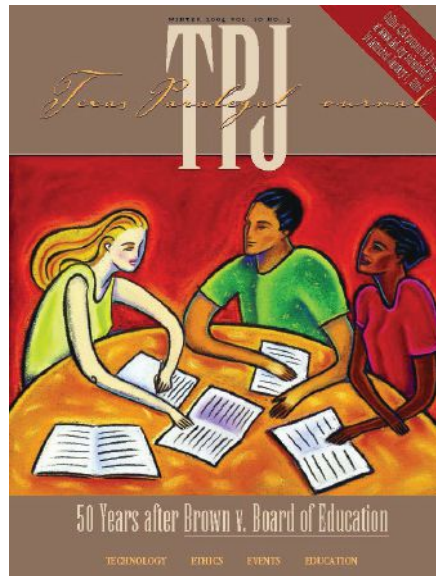
How did you get involved in doing the work that you do? "When I went to the University of Texas, I wasn't really aware of graphic design—I thought the art department was for fine artists and commercial artists. I got my Master's in Philosophy and somehow got a job as an editor for the Texas State Historical Association. There wasn't a budget for design, so that role fell to me. I discovered I was a better designer than I was an editor! In 1986, I got a job with a computer magazine publisher. A couple of years later, we transitioned to desktop Macs,



David with his son, Joe

and it occurred to me that if I bought one for myself, I could go freelance. Working for yourself requires discipline but is still incredibly gratifying."

David has been the graphics artist for the Paralegal Division from 1994 to the present. In 1992, the Paralegal Division originally had a newsletter edited by his friend in El Paso, Eddie Selig, who brought David on board when the Paralegal Division decided to create a printed magazine. The *Texas Paralegal Journal* became one of the top membership benefits of the Paralegal Division. The quarterly magazine features articles about different legal areas and topics, events, and updates about Paralegal Division events and in the paralegal profession. The *TPJ* Editor and Publications Committee are comprised of Paralegal Division members who volunteer their time and are appointed by the President each term. David, of course, provides the graphic design, but also, nurtures and assists these volunteers to ensure the *TPJ* is complete. (In my case, very *patiently* assists.) When the *TPJ* transitioned to a digital format, this provided an opportunity for it to become



more dynamic, by producing color pages throughout (instead of a couple of color pages due to print costs), to include hyperlinks, and the front and back presentation pages that serve as information specifically to our members. David has been a big part of that transformation as well.

What can you say about your industry then and now? "Then, as now, I received

Word files from the editor. Nothing else is similar. Most people didn't have internet service. There were no pdfs (horrors!) I created PageMaker files that were taken to a service bureau for camera-ready reproductions. There were no media for high capacity storage. The printer stripped in any photos or art. Now, of course, everything is digital, thank goodness."

"The Paralegal Division and I have created a kind of family over the years. Or a really solid marriage. It's been wonderful to have that kind of relationship—I'm very grateful for that. Mazel tov! All the best to everyone for your 40th Anniversary!" —

David Timmons

The Paralegal Division website and *Texas Paralegal Journal* are phenomenal achievements and tremendous assets of the Division. We are very grateful for the time, effort, consideration, and compassion Len Hardin and David Timmons have given to the Paralegal Division. These gentlemen are behind the digital curtain of the Paralegal Division, and we are thankful for them.



Scruples

The Ethics of Professionalism and Coworkers

Most people enjoy being part of a team, particularly one that works well together. After all, everyone on the legal team has an important role to play in getting the work completed. It is easy to work well with people with whom you get along. We often develop friendly and sometimes close relationships with some coworkers. Having those relationships makes working together fun and often more productive.

When everyone does their part and gets along well, things are great. But what about when things are not running smoothly? Or when personalities clash?

There are many ways coworkers may make work more difficult. Although contemplating doing something ugly in return or daydreaming about smacking some sense into them may seem satisfying, there are better and more professional ways to deal with problematic coworkers.

Unfortunately, complaining about a coworker is unlikely to get the desired result and often makes the person complaining seem petty and unwilling to work with others. Instead, you may need to try a different approach.

If your coworker's actions are affecting your ability to do your job, such as making you wait for information you need, discuss it with the coworker and attempt to resolve the issue. If nothing changes, then you should alert your supervisor. While not making any disparaging comments about your coworker, advise your supervisor that your coworker is not getting you the information you need. Confirm that you have discussed the matter with your coworker and tried to resolve the issue but were not successful. By focusing on how the situation is preventing you from doing your job, rather than personal differ-

ences, your supervisor will be much more inclined to step in to address the problem.

Sometimes a coworker just seems to dislike you, and often you have no idea why, and they make the working environment difficult. Perhaps it is jealousy, or an imagined slight. Although it is often a good idea to ask someone directly what the issue is, coworkers with negative attitudes toward others often refuse to discuss the issue or deny any problem exists. In these situations, the best approach is to change your relationship with that coworker.

A good way to begin trying to change your relationship with someone who appears not to like you is to ask their advice or opinion about something. It can be work related, but often it is better to pick a topic that is an interest of theirs. For example, perhaps your coworker loves collecting certain items, or enjoys bird watching. Tell your coworker that your friend (it can be an imaginary friend) is interested in getting started with that activity and you are seeking recommendations. Perhaps your coworker will only give you minimal information. If that happens, you can ask a couple of brief follow-up questions, then sincerely thank your coworker for the information. A few days later, let your coworker know that your friend appreciated the information and is going to take your coworker's suggestion.

The next step may be to ask your coworker for their opinion on something at work, perhaps the firm's holiday schedule or new software. Anything will do as long as the topic isn't too controversial. Follow that with stopping by to tell your coworker a brief funny or interesting story (work related or not). You don't even have to wait for their response. Just finish by

saying you thought your coworker might enjoy the story or think it was interesting, then wish them a good day. If you have a chance, doing occasional small favors for your coworker such as bringing them their print job or a package that was delivered to the receptionist is also quite helpful. It does take quite a bit of time but by using this method, most people will eventually become much friendlier.

Whatever the situation, remember that the absolute last thing any supervisor wants to address is a complaint, particularly about a coworker. Even if your complaint is valid, if it isn't directly affecting your ability to job, your supervisor will likely view you negatively, rather than your coworker.

Of course, before criticizing their coworkers, paralegals should examine their own behavior. Hopefully you are not guilty of any unprofessional and unethical actions such as the following:

- padding your time
- blaming someone else for your error
- taking credit for someone else's work or idea
- gossiping
- trying to police others who do not report to you.

No matter how difficult a coworker is, no one should ever be able to tell by your actions what your feelings are about that coworker. Above all, never let anyone else's behavior or actions cause you to behave less than professionally. That is the sign of a true professional.



Ellen Lockwood, ACP, RP, is the Chair of the Professional Ethics Committee of the Paralegal Division and a past

president of the Division. She is a frequent speaker on paralegal ethics and intellectual property and the lead author of the Division's Paralegal Ethics Handbook published by Thomson Reuters. She may be contacted at ethics@txpd.org.



PARALEGAL DIVISION



Notice of 2022—District Director Election

The Paralegal Division's DIRECTOR ELECTION for District Directors in even-numbered districts (Districts 2, 4, 10, 12, 14, and 16) will take place March 24 through April 11, 2022.

2021-2022 District Election Committee Sub-Chairs:

District 2 – Joncilee Davis, ACP - joncilee@yahoo.com

District 4 – Jennifer Rogers – jen.rovers@huschblackwell.com

District 10 – Jennifer Barnes JBarnes@jenkinskamin.com

District 12 – Renita Brown - rbrown@

hbvwlaw.com

District 14 – Samantha Huff – samn-huff@hotmail.com

District 16 – Clara Buckland - clara.buckland@epelectric.com

NOTICE OF VOTING— March 24 through April 11, 2022

All Active members of the Paralegal Division in good standing as of March 23, 2022 are eligible to vote. All voting must be completed on or before 11:59 p.m., April 11, 2022.

All voting will be on-line and no ballots will be mailed to members.

Please take a few minutes to log on to the PD's website (beginning March 24) and cast your vote for your district's director. The process is fast, easy, anonymous, and secure.

- Between March 24th and April 11, 2022 go to www.txpd.org
- In the Members-Only section, click on "Vote"
- Follow the instructions to login and vote

BOARD OF DIRECTORS

Quarterly Board Meeting Summary, Winter 2021

Submitted by President-Elect, Lisa Pittman
president-elect@txpd.org

The Annual Meeting was held in conjunction with TAPS 2021 on Friday, September 24, 2021. The Board of Directors met on Friday, September 24, 2021 and Saturday, September 25, 2021 in San Antonio, Texas.

Here are some points of interest from the Board Meeting:

40th Anniversary —The 40th Anniversary for the Paralegal Division was celebrated at the 2021 TAPS in San Antonio, Texas. Javan Johnson, TBLS-BCP, ACP, Chair of the 40th Anniversary Committee and a charter member gave the history of the Paralegal Division. Also in attendance was fellow charter member Michele Boerder, TBLS-BCP, CP, District 2.

The State Bar of Texas was the first bar association in the United States to create

(and recognize) a separate division for paralegals! The Paralegal Division of the State Bar of Texas was created on October 23, 1981.

TAPS 2021 —was held September 22 —24, 2021 in San Antonio. There was a Thursday, Casino Night Social that was enjoyed by all in attendance. Our TAPS Planning Committee did an excellent job with the variety of speakers in a 5 tract seminar. A special thank you to all our vendors, speakers and attendees that made TAPS a success despite a very trying time

for all during the COVID pandemic! TAPS 2022 will be held September 28-30, 2021 in Fort Worth

Annual Meeting —was held on September 24, 2021 at the TAPS 2021 Friday luncheon. Our keynote speaker Justice Beth Watkins, Fourth Court of Appeals, presented a very inspirational speech entitled "When Life Closes A Door." The Exceptional Pro Bono Service Award recipient was Monty Mayes, District 3. The Outstanding Committee Chair recipient was Melanie Langford, District 6. Special Awards were

also presented to Rebecca “Becky” Lopez, District 16, for her efforts involving the Student Program with her local college, Outgoing Directors: Janet “Jan” McDaniel, for her dedication and leadership for District 11 and Martha Ramirez for her dedication and leadership for District 15. PD Coordinator, Rhonda Brashears presented an award to Len Hardin for his many years of dedication as the PD’s

Webmaster and current PD Website Consultant.

Paralegal Pulse and TPJ —The Paralegal Pulse is emailed out monthly and the TPJ is emailed on a quarterly basis. Please open and read them as there is so much information contained in both. And remember to check out the Paralegal Pulse for what is happening in your District and

across the state.

The Board of Directors and Committee Chairs are hard at work for you. Please reach out to them if you have any questions or are interested in learning more about how to serve on a committee or to volunteer. Their contact information is on the website for the Executive Committee and the District Directors.

PARALEGAL DIVISION STATE BAR OF TEXAS

AWARDS HISTORY

AWARDS OF EXCELLENCE

An “Award of Excellence” is an award conferred by the PD Board of Directors, to recognize an individual who has made a substantial contribution to the paralegal profession. The award is given for outstanding merit and shall not be required to be conferred annually.

- 1984—Kathryn King Richards in recognition of her service as the Board’s first chair.
- 1985—Sandy Hardin of the Bar staff in appreciation for her many hours of time devoted to the Division.
- 1989—Gerry Malone was named recipient of the Award of Excellence in recognition of her many years of efforts to improve the professional utilization of legal assistants and for her extensive assistance in the preparation of *Attorney’s Guide to Practicing with Legal Assistants*.
- 1992—Judge Linda Thomas and Spencer Relyea for their outstanding commitment to the Paralegal Division.
- 1994—Gary McNeill of TBLS his work on the Texas Board of Legal Specialization board certification of paralegals
- 1997—Lisa Sprinkle for her efforts in starting and continuing the *Legally Speaking* series.
- 2002—Debra Crosby of San Antonio, as editor of the *Texas Paralegal Journal*, which she volunteered to take on after the death of Nancy McLaughlin.
- 2004—Javan Johnson of Longview)

- 2005—Pamela R. Horn for her initiation and set up of Division’s online CLE
- 2006 —Kim Cantu, CP (Dallas) –worked with SBOT for name change from Legal Assistants Division to Paralegal Division
- 2008—Ellen Lockwood for her work on Paralegal Ethics Handbook
- 2009 —Debbie Oaks for her work on developing the Sustaining Member Vendor Liaison Ad Hoc Committee as well as enormous volunteer hours spent on various volunteer positions with the PD
- 2015 —Patti Giuliano for her work on PD Board and various other PD Committees, including SBOT Pro Bono special committee (for always being there when needed)
- 2016 —Javan Johnson for her work on the PD Coordinator Transition Committee
- 2017 —Stephanie Sterling, TBLS-BCP for her work on Governing Documents
- 2018 —Megan Goor, TBLS-BCP for her dedication to the PD
- 2019 —Michele Boerder, TBLS-BCP, CP in recognition of her overall support of the Paralegal Division
- 2020 —None
- 2021 —Len Hardin, PD Webmaster for his dedication and assistance with the Paralegal Division Website

Awards (Outstanding Committee Chairs and other special awards):

The Outstanding Committee Chair award is presented on an Annual Basis to the

Committee Chair(s) [not more than two] that has performed outstanding service on behalf of the Paralegal Division. Special Awards are by choice and presented to member(s) who has performed one special task during the fiscal year that the Board deems should be recognized.

- 1990—Kathleen Rubinstein, Chairperson of the Elections Committee, received a Special Recognition Award for her contributions to this committee and the Division in setting up the procedures for bylaw amendments to be voted on by mail.
- 1991—Special Division awards were presented to Alain Rondeau for his outstanding personal contribution to the Division, to Sandy Hardin (Bar) for her continued support and ongoing assistance to the Division, and to Gail Stinson as the outstanding Committee Chair for 1990-1991.
- Special Recognition awards were presented to outgoing Bar President James Parsons, outgoing Standing Committee on Legal Assistants (Paralegal) Chair C.L. “Mike” Schmidt, and Houston attorney Tom Womble for their extra efforts on behalf of the Division.
- 1992—An award for Outstanding Committee Chair was presented to Joanna Rondeau as Chair of the Task Force on Long-Range Planning and Reorganization.
- 1993—Luanne Womack received the Outstanding Committee Chair award

- for her work as the Publications Committee Chair. Attorneys Russell Johnson and Mark Warner were presented awards for free legal services rendered to the Division.
- 1994—Special recognition was given to Fernando Guerrero, State Bar Membership Department, Miguel David Wise, Vice Chair of the Legal Assistants Committee of the Bar, and Denise Schumann, Texas Board of Legal Specialization. The Outstanding Committee Chair award went to Sylvia Coatney, Chair of the Professional Development Committee. Javan Johnson, Membership Chair, was also recognized.
- 1995—Committee Chair of the Year award to Javan Johnson of Longview (Membership Committee) and Special Awards to Fernando Guerrero of the State Bar Membership Department for his dedication to the Division and to Kathy Harkins of Austin, Sally Andress of Dallas, and Barbara Coleman of Houston for their service as course directors for the 1995 Continuing Legal Education Seminars sponsored by the Division.
- 1996—The Outstanding Committee Chair awards were presented to Eva-Lisa Dockery, outgoing Chair of Public Relations, and to Chris Levy, Chair of Publications, for their outstanding service to the Division.
- 1997—Outstanding Committee Chair: Kristine Farmer, Professional Development Committee.
- 1998—Special Awards to Ignacio Acosta and Daniel Matta for their assistance in the *Legally Speaking* series. Special awards were also given to Adele Hernandez and Martha Jones for their years of service as Elections and Continuing Education Chairs, respectively.
- 1999—Outstanding Committee Chair Award: Nancy McLaughlin (Austin), Publications Committee Chair. Special Awards were presented to Pat Hammer (Ft. Worth), Annual Meeting Committee Chair; Jo Ann Sims (Teague), Elections Committee Chair, and Ellen Lockwood (San Antonio), Ethics Committee Chair
- 2000—Outstanding Committee Chair Award: Martha Jones, Continuing Education Committee.
- 2001—Outstanding Committee Chair Award: Lisa Sprinkle (LAU [aka TAPS] Planning Committee); Special Award, Joncilee Miller (Membership Committee) and Jodye Kasher (Professional Development Committee).
- 2002—Outstanding Committee Chair Award: Javan Johnson, as LAU [aka TAPS] 2001 Committee Chair, and a special award was presented to Laurell Phillips as the Annual Meeting Committee Chair.
- 2003—Outstanding Committee Chair Award: Jennifer Fielder, Elections Committee.
- Special awards were awarded to Kristine Farmer for her service of LAU [aka TAPS]
- 2002 Planning Committee 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.
- 2004—Outstanding Committee Chair Award(s): Charlene Carroll, Membership Committee for her work in restructuring the Division's membership categories. Patti Giuliano and Linda Studer received Special Awards in recognition of their work on the Annual Meeting.
- 2005—Outstanding Committee Chair Award: Mariann Porter, CLA, El Paso, Statewide Redistricting; Special Award—Melissa Sherman, CLA, Fort Worth, LAU Planning Committee
- 2006—Outstanding Committee Chair Award(s): Carolyn Goff (Galveston) as Chair of the Ambassador Committee; Patti Giuliano (San Antonio) as Chair of the Salary Survey Committee; Special Awards: Debra Crosby, San Antonio—Chair of the Joint Task Force; Caro Dubois, CP, Austin—Chair, 2006 Annual Meeting Committee
- 2007—Outstanding Committee Chair Award(s): Rhonda Brashears, CP, Publications Committee, and Cel Wiginton, CP, Continuing Education Committee—Online CLE
- Special Awards: Ellen Lockwood, ACP, RP and Javan Johnson, ACP—For their work on the Paralegal Division's 25th Anniversary Celebration at the Texas Advanced Paralegal Seminar in September 2006
- 2008—Outstanding Committee Chair Award(s): Jodye Kasher, Professional Development Committee, and Carolyn Goff, Ambassador Committee
- 2009—Outstanding Committee Chairs: Heidi Beginski, Publications Committee, and Erica Anderson, Membership Committee; Special Awards: Patti Giuliano, Chair of the TAPS 2008 Planning Committee, and Jennifer Barnes for all of the volunteer positions held for the Paralegal Division; and Senator Kirk Watson (for his assistance with Texas Paralegal Day Legislative Resolution)
- 2010—Outstanding Committee Chair Award(s): Sheila Milbrandt, Chair, District CLE Committee, and Wendi Rogers, Chair, Ambassador Ad Hoc Committee
- Special Awards: Rhonda Brashears, Chair, TAPS 2009 Planning Committee and Online CLE Committee, Lori Winter and Debbie Spencer, Co-Chairs, 2009 Annual Meeting, Mark Curry, QuickBooks Specialist
- 2011—Outstanding Committee Chair Award(s): Gloria Porter, Elections Committee Chair, and Allen Mihecoby, Professional Development Committee Chair
- Special Awards: Patti Giuliano and Rhonda Brashears, Co-Chairs of TAPS 2010 Planning Committee; Lisa Pittman for her work on the Mentor/Protégé Program
- 2012—Paralegal Division Outstanding Committee Chair Awards were presented to Lori Winter, Chair of the Ad Hoc Committee for Spot Audit and Patti Giuliano, Chair of the Ambassador Ad Hoc Committee. Special Award presented to Cheryl Bryan for her service to the PD as Treasurer.
- 2013—Outstanding Committee Chair Award was presented to Clara Buckland, CP, Chair of the Membership Committee and Lisa Sprinkle was presented the Outstanding Ad Hoc Committee Chair Award (Paralegal Education Programs). A

Special President's Award was presented to Gloria Porter for her "above and beyond volunteer duties as Elections Chair." Other special awards were presented to Ellen Lockwood for her service as Chair of the Professional Ethics Committee and the Paralegal Ethics Handbook Ad Hoc Committee and to Debra Crosby for her service to the Ambassadors Program Ad Hoc Committee.

2014—Paralegal Division Outstanding Committee Chair Award was presented to Susan Wilen, R.N. for her service as Chair of the TAPS Planning Committee for two years. Special Recognition Award was presented to Javan Johnson, TBLS-BCP, for service to the Paralegal Division as the Chair of the TBLS Helpful Hints Guide.

2015—Paralegal Division Outstanding Committee Chair Awards were presented to Heidi Beginski, TBLS-BCP, El Paso, Texas, Chair of the Publications Committee, Gabby Warner, Spring, Texas, Co-Chair E-Newsletter Ad Hoc Committee, and Sheila Posey, TBLS-BCP, Conroe, Texas, Co-Chair E-Newsletter Ad Hoc Committee for their outstanding service to the Paralegal Division.

2016—Paralegal Division Outstanding Committee Chair Awards were presented to Pam Etie, Chair of the Membership Committee; Shannon Shaw, Chair of the Sustaining Member/

Vendor Liaison Ad-Hoc Committee for their outstanding service to the Paralegal Division.

2017—Paralegal Division Outstanding Committee Chair Awards were presented to Susan Davis, Vendor Ad-Hoc Committee and Sheila Posey E-Newsletter Committee for their outstanding service to the Paralegal Division. Special Awards were given to Vickie Lorenzen for her work on the Oil and Gas Specialty Exam and Debra Pointer for her work on the Spot Audit

2018—Paralegal Division Outstanding Committee Chair Awards were presented to Debra Pointer for her work on the Spot Audit and to Francesca Romans for her work on the Membership Committee.

2019 —Paralegal Division Outstanding Committee Chair Award was presented to Kara O'Shaughnessy for her work on the Online CLE Committee. Special Awards were presented to supporting vendors Innovate Legal Solutions, Inc., Kim Tindall & Associates, Inc. and Express Records.

2020—Paralegal Outstanding Committee Chair Award was presented to Margie Putman for her work on the Online CLE Committee and to Erica Anderson for her work on the Public Relations Committee. A Special Award was presented to Debra Pointer for her work on the Spot Audit Ad Hoc Committee.

2021—Paralegal Outstanding Committee

Chair Award was presented to Melanie Langford for her work on the Elections Committee. A Special Award was presented to Rebecca Lopez for her work with El Paso Vista College Paralegal Program.

Exceptional Pro Bono Awards:

1997—Patricia Hammer, CLA (Fort Worth)—**first recipient**
 1998—Stephanie Seuser (Austin)
 1999—Kellie Early (Longview)
 2000—Sharon Wagner (Houston)
 2001—
 2002—Sandra Walker (Austin)
 2003—Gloria Martin (Lubbock)
 2004—Lisa Ivey (Houston)
 2005—Martha Jones (Austin)
 2006—Cecile Wiginton, CLA (Midland)
 2007—Jena Parker, CP (Fort Worth)
 2008—Constance Nims (Dallas)
 2009—Sherrie Lacy (Dallas)
 2010—Lyla Malolepszy (Denton)
 2011—Pamela R. Horn (Austin)
 2012—Elma Moreno (Lubbock)
 2013—Julie Sherman (Fort Worth)
 2014—Susan Wilen (San Antonio)
 2015—Allen Mihecoby (Dallas)
 2016—Rachel Watson (Fort Worth)
 2017—Katrina Lea (Fort Worth)
 2018—Toya Walker
 2019—Amber Haney (Austin)
 2020—Susan Davis (Fort Worth)
 2021—Monty Mayes (Forth Worth)

Have a Topic to Share?

*Let us know if you have an article you would like to publish.**

Example topics:

- **Substantive Legal Articles** (all areas of law: bankruptcy, civil trial, criminal, family, immigration, corporate/business, environmental, oil & gas; probate, real estate, employment, personal injury, entertainment, intellectual property, etc.)
- **Pre-Litigation:** Subrogation, Interview Techniques, Obtaining a Proper Witness Statement
- **Litigation:** Trial Notebooks, Organization of Complex Document Production, Use of Databases, "On-the-Road"
- **Importance of the Role of Paralegal**
- **Non-Traditional Roles for Paralegals**
- **Pro Bono**
- **Technology Tips**
- **PD Member Achievements**

Submit your article to Editor at tpj@txpd.org. *Minimum 2,000 words/.doc format.

2021 PARALEGAL DIVISION ANNUAL MEETING “AGAINST ALL ODDS”

An outstanding three-day TAPS event in San Antonio, Texas ending with a beautiful luncheon and Annual Meeting to celebrate our 40th Anniversary.

Edna Garza-Guerra, TBLS-BCP, TAPS Chair and Immediate Past President opened the Annual Meeting welcoming all attendees and introducing the TAPS Committee. Edna also introduced the two Scholarship recipients: Linda Duffney of Dallas and Kathy Shipley of San Antonio. She continued thanking the TAPS Table sponsors and announced TAPS 2022 in Ft. Worth, Texas.

Edna then introduced Susi Boss as the 2021-2022 President who called the meeting to Order and asked that Lisa Pittman, President Elect read the Division's Code of Ethics and Professional Responsibility. Shannon Shaw, Parliamentarian read the Rules of Order and Susi asked for the approval of the 2020 Annual Meeting Minutes which were approved. Eugene Alcala, Treasurer then read the Treasurer's Report.

Susi Boss turned the meeting back over to Edna Garza-Guerra for recognition of the 2020-2021 Board of Directors and Committee Chairs as well as the Exceptional Pro Bono Award to Monty Mayes of Ft. Worth. Awards were also given to Melanie Langford as Outstanding Committee Chair for Elections and the Special Award for outstanding work of Rebecca Lopez with The Vista College Program Director and Students.

Awards were given to Directors Janet McDaniel a(District 11) and Martha Ramirez (District 15) for completion of their terms in office.

Susi Boss recognized Edna Garza-Guerra for her 2020-2021 Presidency and Edna was given a plaque showing the PD's appreciation.

Rhonda Brashears had the honor of award the 2020-2021 Award of Excellence to Len Hardin for his work with the PD. See video on YouTube.



Edna Garza-Guerra announced the 2021-2022 Board of Directors stating that the Board was installed in June 2021. Noting Directors and Officers alike. Recognizing also Rhonda Brashears the PD Coordinator.

Susi Boss presented the President's State of the Division Address, recognizing special guests including Past Presidents for the 40th Anniversary celebration. At this time Susi recognized Javan Johnson, Chair

of the 40th Anniversary Committee who gave a history lesson on the PD to all.

Special Guest Speaker, Justice Beth Watkins was introduced by Susi with her keynote address being “When Life Closes a Door”.

Susi after Justice Watkins asked for any new business and hearing note asked for a vote to close the meeting and concluding the 2021 Annual Meeting.

Susi was honored to announce that

in lieu of speaker gifts all funds were donated to a San Antonio charity, “Pearls Court” she presented a check to Judge Angelica Jimenez, Judge Rosie Alvarado and Kimberlee Morrison on behalf of the Pearls and Eagles Court.

Concluding all festivities and activities and business TAPS Grand Prize Sponsors provided three \$500.00 cash prizes to three TAPS attendees: Austin Bar; Lowey Law Firm and San Antonio Bar Foundation (President Andy Morales). Winners were

Andrea Schrock, Kerri Alexander and Patricia Smith (I am so jealous but hope each of you enjoys your winnings). Be sure to go to the PD’s YouTube channel to see the Annual Meeting and TAPS slide show.



2021-2022 President Susi Boss



Keynote Speaker Hon. Beth Watkins



San Antonio Bar Foundation President Andy Morales and Winners, Patricia Smith, Andrea Schrock, and Kerri Alexander



Outstanding Committee Chair Award Recipient, Melanie Langford, and 2020 President Edna Garza-Guerra

Award of Excellence 2021 Recipient - Len Hardin

by Rhonda Brashears, CP, TBLS-BCP

The “Award of Excellence” is an award conferred by the PD Board of Directors, to recognize an individual who has made a substantial contribution to the paralegal profession. The award is given for outstanding merit and shall not be required to be conferred annually.

The 2021 year recipient was Len Hardin. Len served as the Paralegal Division Webmaster for over twenty years. He was instrumental in putting the Paralegal Division in a position where we could give ourselves a presence through a website. He worked tirelessly for years building and expanding the capabilities of our website to the one we have today. Our website provides the public information about our association and the paralegal profession, it provides services to our




members such as a statewide directory of other members, the ability to track our CLE, to link to other professional associations, to locate Vendor members statewide, to register for TAPS and the list goes on and on.

Len Hardin has been there, with a constant “yes we can do that” to provide the

Paralegal Division the growth through our website that we have enjoyed over the past 20 years. Len gently walked us through the transition of building a new website. He was an invaluable resource in making sure our new website was built and rolled out with as little down time and as seamlessly as possible.

Len is still working with the Paralegal Division on a consulting basis to assist with new additions to our website, maintenance, and member questions. Len’s assistance over the years has made a substantial contribution to Paralegal Division members. (View the award presentation at Annual Meeting here.)

Thank you, Len Hardin, for your years of dedicated service to the Paralegal Division!

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Paralegal Division**

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Post-Judgment Turnover Receiverships

You have a judgment, now what? A discussion of the remedy available to judgment creditors of post-judgment turnover receiverships under Chapter 31 of the Texas Civil Practice and Remedies Code.

2020-2021 Special Award to Rebecca Lopez, District 16 Director

By Lisa Pittman, President-Elect

To award Rebecca “Becky” Lopez special recognition for her efforts in District 16 with students and mentorship interest.

When Becky became a Director in 2016, there were no student memberships in her District. In January 2019 she was invited to speak to the paralegal students at Vista College in El Paso, Texas. She gave a presentation to the students regarding the State Bar of Texas—Paralegal Division’s Student Membership and the benefits of membership.

In April 2019, Vista College’s Director of the Paralegal program, Mike Soto advised Becky that the VP of Admissions



Rebecca Lopez

agreed to paying for a Paralegal Division Student Membership for all their paralegal students enrolled in the program that had completed 75% of the program. As a

result of Becky’s efforts with Vista College, she soon had 30 student memberships.

In January 2020, prior to COVID 19 and before “Zoom meetings” were even heard of, Becky and Mr. Soto collaborated and offered a “mentor video conference” to the students at Vista College, with President Megan Goor-Peters, TBLS-BCP as the first guest speaker. The students were very engaging and asked excellent questions.

Becky served as Treasurer from 2019-2020 and as District 16 Director previously from 2016-2020 and is currently serving as the District 16 Director.

2020-2021 Exceptional Pro Bono Award Recipient: Monty Mayes

By Wayne Baker, RP, District 3 Director

Most of us are familiar with that warm, tingly feeling inside that you get when you help others. Helping those in need in their darkest times can be very rewarding. For many of us, this is something we feel occasionally. But to give of yourself and make sacrifices in service of others on a regular basis takes a special heart for service. Some people have a heart that drives them to seek out opportunities to serve and give back, often at the sacrifice of their self. Monty Mayes is someone who has that special kind of heart. Monty is an outstanding paralegal who is dedicated to providing pro bono and community service to the Tarrant County community in need. Monty often partners with the Tarrant County Volunteer Attorney Services (TVAS) on behalf of the Fort Worth Paralegal Association (FWPA) and the Paralegal Division to assist with organizing, coordinating, and gathering volunteers for pro bono clinics and resources in Tarrant County. He has been coordinating these efforts and tirelessly providing pro bono services for multiple years.

Monty’s efforts in his community have drastically increased the availability of legal services to those in need that do not have the means to afford legal services. In cooperation with TVAS, Monty regularly assists attorneys with clinics and resources



designed to provide legal services to disabled military, poor, and elderly individuals. The resources provided include pro bono clinics, events at community shelters, community outreach and education, and intake and screening of indigent individuals in need of legal services. All of these efforts are invaluable to the members of the Tarrant County area.

It was because of Monty’s efforts and his special heart for service that the Paralegal Division of the State Bar of Texas was proud to present him with the



Monty Mayes

Exceptional Pro Bono Award for 2020-2021. Monty’s service to others is truly exceptional. And in the fashion of a true giver, Monty humbly accepted the award at the Texas Advanced Paralegal Seminar, where he thanked and gave all the credit to everyone else who assisted him in his endeavors.

“Life’s most persistent and urgent question is, “What are you doing for others?”

—Martin Luther King, Jr.

TAPS is Roaring into 2021

By Edna Garza-Guerra, TBLS-BCP, TAPS 2021 Chair

The 2021 Texas Advanced Paralegal Seminar ("TAPS") themed, *"With a Roll of the Dice and CLE for Everyone, TAPS is Roaring into 2021"* was held on September 22-24, 2021 at the Omni Colonnade Hotel in San Antonio, Texas. Unlike last year's online seminar, this was the PD's first live TAPS event since 2019. It was a great success and people seemed happy to be there in person! Some attendees were able to visit with familiar faces while others were able to meet new Paralegals from across the state and network with each other.

TAPS provided 3 days of awesome CLEs wherein members and non-members obtained up to 13 hours of CLEs. We had approximately 59 Speakers and members were able to attend CLEs pertaining to: Civil Trial Law; Copyright—Intellectual Property Law; Corporate Law; Criminal Law; Employment Law; Estate Planning and Probate Law; Family Law; Personal Injury Law; and Real Estate Law. In addition, we had a total of 29 Vendors from across the state who provided gift bags (some even handed out very unique items!!!) and brochures. Attendees were able to meet vendors they work with on a daily basis in person. It's always nice to put a name behind the face!

The Wednesday evening social, *"Make a Bet on your Vendors,"* was held to promote networking with vendors while enjoying snacks and a cash bar. Various prizes were handed out to attendees.

The Thursday night social, *"Be a High Roller at the TAPS Casino... Celebrating 40 Years,"* was a great success as well. The dinner and gambling was a great way to kickoff the PD's upcoming 40th Anniversary! The dinner (buffet style) was amazing and the gambling was lots of fun—too much fun! Attendees, some decked out really nicely in their roaring 1920's attire, received a total of \$5,000.00 in chips and were able to play their favorite games. There were many gambling professionals in the room and no doubt, some will be heading out to Las Vegas soon! All and all, the casino theme made



TAPS PC meeting



Frank Hinnant, Innovative Legal Solutions, with TAPS Costume Winners

for a fun evening, Las Vegas style!

On Friday, the TAPS luncheon ("Against all Odds") and Paralegal Division's 40th annual meeting was held. The keynote speaker was Justice Beth Watkins of the 4th Court of Appeals, who spoke about, "When Life Closes a Door." Justice Watkin's address to Paralegals was very moving and compelling. She discussed the limits she put on herself as

a teenager and the things that happened to her to help her come out of her shell, making her the great success she is today. In short, her story provided inspiration and hope to the attendees appointing out that when one door closes, look to open another door.

At this time, I'd like to recognize the TAPS Planning Committee who worked hard and tirelessly year round to put this



successful event together. Please note that these Members have served in this committee for numerous years and in my opinion, are experts in their appointed positions. They include:

Susi Boss — *TAPS Secretary, Scholarship, Speakers & Board Advisor (President)*
 Rhonda Brashears — *TAPS Meeting Planner (PD Coordinator)*
 Kerri Alexander-Overfelt and Susi Boss — *Speakers*
 Megan Goor-Peters — *TAPS App and Registration (Past President)*
 Erica Anderson — *Marketing (Past President/Director [Dist. 7])*

Javan Johnson — *Socials (Past President/Director)*
 Alice Lineberry — *Door Prizes (Director [Dist. 4])*
 Susan Davis — *Vendors*
 Frank S. Hinnant — *Public Member/Innovative Legal Solutions*
 Jennifer Chambless — *Public Member/Kim Tindall & Associates*
 Kelsey Clark — *Public Members/File & ServeXpress*

Erica Anderson
 Jennifer Barnes
 Marie Boleslawski
 Marcy Castanon
 Pearl Garza
 Mei Ling Jew
 Janet McDaniel
 Jessica Newlin
 Kay Shipley

Be sure to view the TAPS 2020 slide show here.

A special thanks to all the TAPS Volunteers — Thank you, we couldn't have done things so smoothly without you!!!! They include:

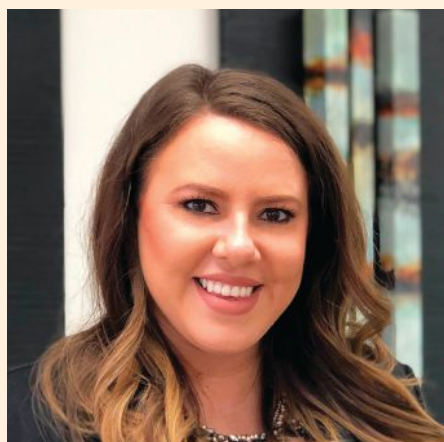
Please mark your calendars for TAPS scheduled on September 28-30, 2022 in Fort Worth.

Congratulations to our TAPS 2021 Scholarship Recipients: Lindy Duffney and Kathy Shipley

We had six applicants this year and it was a very tough decision for our judges: Javan Johnson, Erica Anderson and Susan Davis.

The topic for the scholarship application was: **How Have you Coped with the COVID Pandemic and Your Role as a Paralegal in the Workplace and in the Community?**

All of our applicants had wonderful responses to the question in the essays that were submitted but these two based on the criteria not only had wonderful responses to the essays but that they each have never had the opportunity to attend TAPS before and of course due to the COVID issues needed that financial assistance as well.



Lindy Duffney
Katzen Firm, PLLC in Dallas, Texas

I hope that we continue to receive this many applications for TAPS as a way of the Paralegal Division being able to give back to our members with this great opportunity that some may not have



Kathleen Shipley
Langley Banack & Pfeuffer, New Braunfels, Texas

except for the annual scholarships.

See all of you at TAPS 2022 in Fort Worth!

Susi Boss, 2021 President/TAPS
Scholarship Chair



Past Presidents Attending TAPS 2021: (left to right) Susi Boss, Megan Goor-Peters, Clara Buckland, Javan Johnson, Joncilee Davis, Mona Tucker, Stephanie Sterling, Michele Boerder, Rhonda Brashears, and Erica Anderson.

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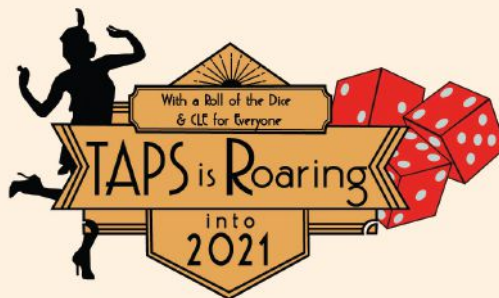
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EXCEPTIONAL PRO BONO SERVICE AWARD

The Paralegal Division (PD) of the State Bar of Texas is proud to sponsor an Exceptional Pro Bono Service Award. Its purpose is to promote the awareness of pro bono activities such as those defined by the State Bar of Texas, and to encourage PD members to volunteer their time and specialty skills to pro bono projects within their community by recognizing a PD member who demonstrates exceptional dedication to pro bono service. Paralegals are invited to foster the development of pro bono projects, to provide assistance to established pro bono programs, and work closely with attorneys to provide unmet legal services to people with low incomes. This annual award will go to an individual PD member, who performed the pro bono service(s) in the State of Texas and has volunteered his or her time and special skills in providing uncompensated services in pro bono assistance to their community. The recipient of the award will be announced at the Paralegal Division Annual Meeting Luncheon, his/her expenses to attend the Annual Meeting Luncheon will be incurred by the Division, and a profile of the individual will be published in the Fall issue of the *Texas Paralegal Journal*.

Definition of Paralegal Pro Bono Service (Adopted June 2013)

Providing legal assistance, without remuneration or compensation to the paralegal, that requires specific legal skills, knowledge or training, under the supervision of a licensed attorney or qualified organizations, whether individually, or through non-profit charitable, religious, civic, community, or governmental organizations, and serving as an advocate for those with limited means or that are unable to speak for themselves.

1. Providing legal support services for persons of limited means, either through qualified legal services/legal aid programs.
2. Providing legal support services at community legal clinics; and
3. Providing assistance for, working directly with attorneys on cases, or providing direct client advocacy, under legal services/advocacy programs that are sponsored by a bar association, court, governmental agency or non-profit agency.

Please complete the attached nomination form, and return it **NO LATER THAN APRIL 30, 2022** to the following:

Heather Ulliman
GoransonBain Ausley, PLLC.
8350 N. Central Expressway, Suite 1700
Dallas, TX 75206
P: (972) 989-0707
ProBonoChair@txpd.org



**EXCEPTIONAL PRO BONO SERVICE AWARD
NOMINATION FORM**

Individual's Name: _____

PD Member Number: _____

Firm: _____ Job Title: _____

Address: _____

Phone: _____ Fax: _____ Yrs. in Practice: _____

Work Experience: _____

Give a statement (on a separate sheet using "Nominee" rather than the individual's name) using the above definition and following guidelines as to how the above-named individual qualifies as rendering Exceptional Pro Bono Service by a Paralegal Division Member:

1. Renders service without expectation of compensation.
2. Renders service that simplifies the legal process for (or increases the availability) and quality of, legal services to those in need of such services but who are without the means to afford such service.
3. Renders to charitable or public interest organizations with respect to matters or projects designed predominantly to address the needs of poor or elderly person(s).
4. Renders legislative, administrative, political or systems advocacy services on behalf of those in need of such services but who do not have the means to afford such service.
5. Assist an attorney in his/her representation of indigents in criminal and civil matters.

Return (no later than April 30, 2022) to:

Heather Ulliman
GoransonBain Ausley, PLLC.
8350 N. Central Expressway, Suite 1700
Dallas, TX 75206
P: (972) 989-0707
ProBonoChair@txpd.org



MENTOR PROGRAM

BE A MENTOR | HAVE A MENTOR

Protégés:

- Receive guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Access to valuable networking opportunities with other paralegals and the legal community through your mentors and others at state-wide and district PD events.
- Opportunities to learn more about the PD and PD activities & opportunities to get more involved.

Mentors:

- Opportunity to share your guidance/direction/support on topics such as ethics, career advancement, & professionalism.
- Encourage and promote the Division, and opportunities to participate in the Division.
- Invite Protégés to attend Division functions, and introduce Protégés to Division leadership, as well as some of the members.

*Voting, active members in good standing, with at least seven (7) years of experience as a paralegal, are qualified to serve as Mentors. Mentors must complete the requisite application acknowledging Mentor has read and agrees to follow the Mentor Program Guidelines.

SIGN UP TODAY

For more information contact:
mentorprogram@txpd.org



ASSOCIATE MEMBERSHIP



Join forces with an elite group of lawyers and paralegals who lead our profession.

Through associate member status, the College honors paralegals that make a commitment to maintain and enhance their professional skills through attending an extraordinary amount of continuing legal education hours.

REQUIREMENTS

A paralegal may become, or may maintain his or her status as an associate member of the College by

- (1) completing twelve hours of accredited CLE in the previous OR current calendar year which must include two hours of ethics,
- (2) paying the required fee,
- (3) submitting an application form on which a licensed Texas attorney verifies the applicant's good character and qualifications as a paralegal, and
- (4) submitting a report identifying the sponsor of the CLE programs attended, the specific topics included, the names and firms of speakers on the programs.

Two of the twelve hours including one hour of ethics may be earned through self-study.

BENEFITS

- A certificate of membership suitable for framing and a leather portfolio with the College logo
- The distinction of attaining a higher level of professional membership
- Unlimited access to TexasBarCLE's Online Library, a searchable database of over 27,000 CLE articles, forms, and case law updates
- Discounts for many live and video replay courses through TexasBarCLE, the State Bar's award-winning CLE department
- Use of the College logo on business cards, websites, letterhead, email signatures, etc.

To join, visit texasbarcollege.com.

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