

# *PARALEGAL DIVISION STATE BAR OF TEXAS*



Prepared by:  
Alice Lineberry, PLS, CP  
*President 2024-2025*

## **Historian Report 2023-2024**

### 2023-2024 Incoming Board Meeting

The Incoming Board Meeting was held on June 10, 2023, in Dallas, Texas. President Joncilee Miller discussed her plans and goals for the year of “Leading a Legacy.”

### **2023-2024 Board of Directors**

<b>2023-2024 Executive Committee &amp; Officers</b>	
President	Joncilee Miller, ACP
President-Elect	Alice Lineberry, PLS, CP
Treasurer	Shannon Shaw (resigned July 31, 2023) Maria Sturdy appointed
Secretary	Heather Ulliman, TBLS-BCP
Parliamentarian	Kim Goldberg, TBLS-BCP
<b>2023-2024 District Directors</b>	
<i>District 1 Director</i> Kim Goldberg, TBLS-BCP	<i>District 10 Director</i> Shannon Shaw (resigned) Marie Boleslawski, ACP
<i>District 2 Director</i> Heather C. Ulliman, TBLS-BCP	<i>District 11 Director</i> Shannon Mendez Smith
<i>District 3 Director</i> Monty Mayes, TBLS-BCP	<i>District 12 Director</i> Pamela Snavelly, ACP
<i>District 4 Director</i> Billy Hart	<i>District 14 Director</i> Maria Sturdy
<i>District 5 Director</i> Pearl Garza	<i>District 15 Director</i> Arturo Ortiz
<i>District 7 Director</i> Tina Alexander (resigned)	<i>District 16 Director</i> Clara Buckland, CP

Marnee Bolen (appointed June 2024)	
------------------------------------	--

The following committee chairs, advisors, and liaisons were appointed:

Standing Committee Chairs/Board Advisors:

<b>Committees</b>	<b>Chairs</b>	<b>Board Advisors</b>
2023 Annual Meeting	Joncilee Miller, ACP	Lisa Pittman
Continuing Education – District CLE	Rhonda Brashears, CP, TBLS-BCP Joncilee Miller, ACP Alice Lineberry, PLS, CP ( <i>interim</i> ) Becky Alldredge appointed June 2023	Kim Goldberg
Continuing Education – Online CLE	Lisa Pittman	Pearl Garza
Elections	Melanie Langford	Maria Sturdy
Membership	R.D. Whitten	Shannon Shaw
Procedures Manual	Alice Lineberry, PLS, CP	Not applicable
Professional Development	Michele Boerder, CP, TBLS-BCP	Billy Hart
Professional Ethics	Ellen Lockwood, ACP, RP	Pamela Snavelly, ACP
Public Relations	Kerri Alexander	Clara Buckland, CP
Publications	Rhonda Brashears, CP, TBLS-BCP ( <i>interim</i> )	Tina Alexander

Ad Hoc Committee/Board Advisors:

<b>Committee</b>	<b>Chair</b>	<b>Board Advisor</b>
Ambassadors Program	Susi Boss	Arturo Ortiz
E-Group Policy	Jay Williams, TBLS-BCP	Pearl Garza
eNewsletter – <i>Paralegal Pulse</i>	Javan Johnson, ACP, TBLS-BCP	Clara Buckland, CP
Emeritus Membership	Mona Tucker, ACP	Billy Hart
Ethics Handbook	Ellen Lockwood, ACP, RP	Pamela Snavelly, ACP
Governing Documents	Javan Johnson, ACP, TBLS-BCP	Joncilee Miller, ACP
Leadership Development	Susi Boss	Shannon Smith
Membership Renewal Spot Audit	Patti Giuliano	Shannon Shaw
Mentor Program	Casey Mills, TBLS-BCP	Heather Ulliman, TBLS-BCP
Pro Bono	Julie Sherman, TBLS-BCP	Monty Mayes, TBLS-BCP
Procedures Manual/Standing Rules Review	Alice Lineberry, PLS, CP	Heather Ulliman, TBLS-BCP

<b>Committee</b>	<b>Chair</b>	<b>Board Advisor</b>
Procedures for Social Media	Alice Lineberry, PLS, CP	Heather Ulliman, TBLS-BCP
Standing Rules & Bylaws [default Parliamentarian]	Kim Goldberg, TBLS-BCP	Not Applicable
Student Liaison	Elaine Simons, CP	Maria Sturdy
TAPS 2023 Planning Committee	Lisa Pittman	Joncilee Miller, ACP
TAPS 2024 Planning Committee [default President]	Joncilee Miller, ACP	Alice Lineberry, PLS, CP
TBLS Examination Helpful Hints	Javan Johnson, ACP, TBLS- BCP	Kim Goldberg
Texas Bar College Membership Application Review	Megan Goor, TBLS- BCP	Tina Alexander
Vendor Liaison	Diane Olack	Arturo Ortiz

Liaison appointments:

<b>Committee/Organization</b>	<b>Liaison</b>
American Alliance of Paralegals (AAPI)	Clara Buckland, CP
American Association for Paralegal Education (AAfPE)	Billy Hart
American Association of Legal Nurse Consultants (AALNC)	Pamela Snavelly, ACP
American Bar Association (ABA)	Tina Alexander
Council of Chairs	Joncilee Miller, ACP
Office of Court Administration	Kim Goldberg, TBLS-BCP
National Association of Legal Assistants (NALA)	Pamela Snavelly, ACP
National Federation of Paralegal Associations (NFPA)	Pearl Garza
Secretary of State – Notary Division	Shannon Mendez Smith
Texas Alliance of Paralegal Associations (TAPA)	Joncilee Miller, ACP
Texas Association of Legal Professionals (TALP/NALS)	Maria Sturdy
Texas Board of Legal Specialization (TBLS)	Monty Mayes, TBLS-BCP
Judicial Committee on Information Technology	Alice Lineberry, PLS, CP
Texas Lawyers for Texas Veterans (TLTV)	Shannon Shaw (resigned) Marie Boleslawski, ACP appointed
Texas Young Lawyers Association (TYLA)	Heather Ulliman, TBLS-BCP
Texas Lawyers Assistance Program (TLAP)	Joncilee Miller, ACP

Other Appointments:

Representative to State Bar [default President]	Joncilee Miller, ACP
Representative to State Bar College (2020-2023)	Megan Goor, TBLS-BCP
State Bar of Texas Pro Bono Workgroup	Stephanie Sterling, TBLS - BCP
State Bar of Texas Child Protection Section	Susi Boss
State Bar Legal Services to the Poor in Civil Matters	Megan Goor, TBLS-BCP

State Bar of Unauthorized Practice of Law – Northern Region, District 6	Eugene Alcala
Judicial Committee on Information Technology	Stephanie Sterling, TBLS-BCP
MCLE	Susan Wilen
TAJC Working Group on Access to Legal Services for Low-Income Texans	Ellen Lockwood, ACP

### TAPS 2023

TAPS 2023 was held in Frisco, Texas at the Frisco Embassy Suites and Convention Center on September 27-29, 2023. The theme was “I Spy CLE – TAPS 2023.” Total attendance was 165 for 3-day registrations, 148 attendees were PD members, ten 1-day registrations, and 10 onsite registrations. Thirty-two vendor booths were sold, and all sponsorships were sold.

Our committee was composed of the following people:

<b>Position</b>	<b>Committee Member(s)</b>
Chair	Lisa Pittman
Secretary, Scholarship, Board Advisor	Joncilee Miller, ACP
PD Coordinator/Meeting Planner	Rhonda Brashears, CP, TBLS-BCP
Speakers	Joncilee Miller, ACP
Registrations / Volunteer Coordinator	Marie Boydston
TAPS APP	Patti Giuliano
Marketing	Kerri Alexander
Socials	Javan Johnson, TBLS-BCP, ACP
Door and Grand Prizes	Susi Boss
Vendors	Jennifer Barnes, CP
Public Member	Frank S. Hinnant, Innovative Legal Solutions
Public Member	Kelsey Clark, File & ServeXpress

A Wednesday evening social, “A Gathering for Clues” was held for attendees and vendors. The Thursday evening social, “Where is the Evidence?” was a murder mystery dinner enjoyed by all attendees.

TAPS hosted TBLS Helpful Hints Live for attendees who were interested in knowing more about the TBLS exam.

The Friday morning special session was a presentation by Matt Darby on “Learning All You Need to Know About Becoming an Online Notary, the Statutes, the Correct Forms and Methods of Identification and Swearing in of Person Authenticating the Documents.

At the Annual Meeting on Friday, the attendees enjoyed a presentation from Laura Benitez Geisler on “Leading Your Legacy: The Power of Your Influence,” during our luncheon, “The Final Analysis.”

Kelly Cobb was presented with the exceptional pro bono service award for her pro bono service in her community.

The two TAPS scholarship recipients were recognized: Lisa Gutierrez and Tory Dickerson.

Immediate Past President Lisa Pittman recognized the 2023 Special Award Recipient: File & ServeXpress

Javan Johnson recognized the 2023 Award of Excellence Recipient: Rhonda Brashears.

Lisa Pittman recognized the District Directors who have completed their term of office: Erica Anderson and Wayne Baker.

2023 Fall Board Meeting

The 2023 Fall Board Meeting was held in Frisco, Texas on September 29 and 30, 2023, following TAPS.

General PD business was conducted, and President Miller gave her quarterly report. The Directors reported on activities occurring within their Districts.

Michele Boerder, CP, TBLS-BCP, Past President, and Charter Member, gave a presentation on the History of the Paralegal Division and Leading a Legacy.

TAPS 2024 Planning Committee Meeting

The TAPS 2024 Planning Committee met on February 3-4, 2024 at the Embassy Suites and Convention Center in Denton, Texas. The planning committee was made up of the following:

<b>Position</b>	<b>Committee Member(s)</b>
Chair	Joncilee Miller, ACP
Board Advisor/Secretary/Scholarship Chair	Alice Lineberry, PLS, CP
PD Coordinator/Meeting Planner	Rhonda Brashears, CP, TBLS-BCP
Speakers	Lisa Pittman, Heather Ulliman
Registration	Marie Boydston
TAPS APP	Patti Giuliano
Marketing	Megan Goor-Peters
Socials	Javan Johnson, ACP, TBLS-BCP
Door Prizes	Susi Boss
Vendors	Jennifer Barnes
Public Member	Frank S. Hinnant, Innovative Legal Solutions

Public Member	Kelsey Clark, File & ServeXpress
---------------	----------------------------------

The Committee agreed on the theme for TAPS as “On Silver Wings We Soar into TAPS 2024.” This was also a celebration of 25 years of TAPS.

Winter 2024 Board Meeting

The Winter meeting of the Board of Directors was held at the Embassy Suites in Frisco, Texas on February 2 and 3, 2024.

General PD business was conducted, and President Miller gave her quarterly report. President Miller announced that Pearl Garza will be serving as the President-Elect for the 2024-2025 membership year.

Directors reported on the current status of membership, news from their Districts, and current events scheduled for their members.

A vote was conducted during the meeting based on the ballots received by the Executive Committee Nominating Committee Chair. The following were elected for the 2025-2026 term.

- Parliamentarian – Heather Ulliman
- Treasurer – Maria Sturdy
- Secretary – Marie Boleslawski

A new committee was created on Artificial Intelligence in order to keep abreast of new technology and how it will affect paralegals and the legal profession.

2024 Outgoing Board Meeting

The 2024 outgoing Board Meeting was held at the Embassy Suites in Dallas, Texas on June 21, 2024.

General PD business was conducted, and President Joncilee Miller gave her annual report. The Directors presented their annual reports.

Following the meeting, the following Board was installed by President Miller.

**2024-2025 Board of Directors**

<b>2023-2024 Executive Committee &amp; Officers</b>	
President	Alice Lineberry, PLS, CP
President-Elect	Pearl Garza
Treasurer	Maria Sturdy
Secretary	Marie Boleslawski
Parliamentarian	Heather C. Ulliman, TBLS-BCP

<b>2024-2025 District Directors</b>	
<i>District 1 Director</i> Kim Goldberg, TBLS-BCP	<i>District 10 Director</i> Marie Boleslawski
<i>District 2 Director</i> Heather C. Ulliman, TBLS-BCP	<i>District 11 Director</i> Shannon Mendez Smith
<i>District 3 Director</i> Monty Mayes, TBLS-BCP	<i>District 12 Director</i> Jennifer Harris
<i>District 4 Director</i> Billy Hart	<i>District 14 Director</i> Maria Sturdy
<i>District 5 Director</i> Susi Boss	<i>District 15 Director</i> Arturo Ortiz
<i>District 7 Director</i> Marnee Bolen	<i>District 16 Director</i> Guy McGunegle

TAPS 2024

TAPS 2024 was held in Frisco, Texas at the Embassy Suites and Convention Center in Frisco on October 2-4, 2024. The theme was “On Silver Stars We Soar into TAPS 2024.” Total attendance was 173. Thirty-two vendor booths were sold, and all sponsorships were sold.

A Wednesday evening social, “Welcome to TAPS Opening Night” was held for attendees and vendors. The Thursday evening social, “A Star Studded Mystery” was a murder mystery dinner enjoyed by all attendees.

TAPS hosted TBLS Helpful Hints Live for attendees who were interested in knowing more about the TBLS exam.

At the Annual Meeting on Friday, the attendees enjoyed a presentation from Cindy Tisdale, “Just Say Yes.”

Melissa Dieken was recognized as the 2024 recipient of the Paralegal Division’s Pro Bono Award for all of time and dedication serving others.

Patti Giuliano was recognized as the Outstanding Committee Chair for all of her work and hours serving as the Chair of the Membership Renewal Spot Audit Ad Hoc Committee.

Susi Boss was recognized for all of her time and dedication serving the Paralegal Division and paralegals and was presented with the Paralegal Division’s Special Award.

Frank Hinnant was recognized for all of his outstanding support of the Paralegal Division and paralegal community, especially TAPS, over the years. He was also presented with the Paralegal Division’s Special Award.

Jeff Deyke of TKE (TechKnowledgeEase) was also presented with the Paralegal Division's Special Award. He has worked with the Paralegal Division for the past 25 years during TAPS for years serving our AV needs and making sure everything goes smoothly.

Outgoing Directors were recognized: Pamela Snavely and Clara Buckland.

The Wendi Atwood Rogers Foundation was selected as this year's charity. The TAPS Planning Committee voted to donate the money allocated for speakers and volunteer gifts to this charity. It will provide free mentorship education, helping with and hosting community service projects, and give to those who mentor.

Monica James was the recipient of the Wendi A. Rogers TAPS Scholarship, and Alex Marvin was the recipient of the Tom Hanna TAPS Scholarship.