

# ***PARALEGAL DIVISION STATE BAR OF TEXAS***



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

## **Historian Report 2024-2025**

### 2024-2025 Incoming Board Meeting

The Incoming Board Meeting was held on June 22, 2024, in Dallas, Texas. President Lineberry discussed her goals for the year, along with her theme, “Inspiring Leadership.”

### **2024-2025 Board of Directors**

<b>2024-2025 Executive Committee &amp; Officers</b>	
President	Alice Lineberry, PLS, CP
President-Elect	Pearl Garza
Treasurer	Maria Sturdy
Secretary	Marie Boleslawski
Parliamentarian	Heather Ulliman, TBLS-BCP
<b>2024-2025 District Directors</b>	
<i>District 1 Director</i> Kim Goldberg	<i>District 10 Director</i> Marie E. Boleslawski, ACP
<i>District 2 Director</i> Heather C. Ulliman, TBLS-BCP	<i>District 11 Director</i> Shannon Smith
<i>District 3 Director</i> Monty Mayes, BLS-BCP	<i>District 12 Director</i> Jennifer Harris, CP
<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, TBLS-BCP	<i>District 16 Director</i> Guy McGunegle

A Leadership Presentation was given via Zoom to the Board by Christine Reinhard, a San Antonio attorney and a member of the Steering Committee for the Bexar County Women’s Bar Foundation LEAD Academy.

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

Standing Committee Chairs/Board Advisors:

<b>Committees</b>	<b>Chairs</b>	<b>Board Advisors</b>
2024 Annual Meeting	Alice Lineberry, PLS, CP	Not Applicable
Continuing Education – District CLE	Becky Alldredge	Kim Goldberg, TBLS-BCP
Continuing Education – Online CLE	Lisa Pittman	Susi Boss
Elections	Melanie Langford	Maria Sturdy
Membership	Casey Moore, ACP	Monty Mayes, BLS-BCP
Procedures Manual	Alice Lineberry, PLS, CP	Not applicable
Professional Development	Michele Boerder, CP, TBLS-BCP	Billy Hart
Professional Ethics	Ellen Lockwood, ACP, RP	Jennifer Harris, CP
Public Relations	Kerri Alexander	Guy McGunegle
Publications	Rhonda Brashears, CP, TBLS-BCP ( <i>interim</i> )	Marnee Bolen, TBLS-BCP

Ad Hoc Committee/Board Advisors:

<b>Committee</b>	<b>Chair</b>	<b>Board Advisor</b>
Ambassadors Program	Susi Boss	Arturo Ortiz
Artificial Intelligence Committee	Megan Goor, TBLS-BCP Ellen Lockwood, ACP	Shannon Smith
E-Group Policy	Jay Williams, TBLS-BCP	Susi Boss
eNewsletter – <i>Paralegal Pulse</i>	Javan Johnson, ACP, TBLS-BCP	Guy McGunegle
Emeritus Membership	Heidi Beginski	Billy Hart
Ethics Handbook	Ellen Lockwood, ACP, RP	Jennifer Harris, CP
Governing Documents	Javan Johnson, ACP, TBLS-BCP	Alice Lineberry, PLS, CP
In-House Paralegal Committee	Pam Horn Pearl Garza	Marie E. Boleslawski, ACP
Leadership Development	Joncilee Miller, ACP	Shannon Smith
Membership Renewal Spot Audit	Patti Giuliano	Marie E. Boleslawski, ACP
Mentor Program	Casey Mills, TBLS-BCP	Heather Ulliman, TBLS-BCP
Pro Bono	Julie Sherman, TBLS-BCP	Monty Mayes, BLS-BCP

<b>Committee</b>	<b>Chair</b>	<b>Board Advisor</b>
Procedures Manual/Standing Rules Review [Default Pres-Elect]	Pearl Garza	Not applicable
Procedures for Social Media	Pearl Garza	Heather Ulliman, TBLS-BCP
Standing Rules & Bylaws [default Parliamentarian]	Heather C. Ulliman, TBLS-BCP	Not Applicable
Student Liaison	Elaine Simons, CP	Maria Sturdy
TAPS 2024 Planning Committee	Joncilee Miller, ACP	Alice Lineberry, PLS, CP
TAPS 2025 Planning Committee [default President]	Alice Lineberry, PLS, CP	Pearl Garza
TBLS Examination Helpful Hints	Javan Johnson, ACP, TBLS- BCP	Kim Goldberg, TBLS-BCP
Texas Bar College Membership Application Review	Megan Goor, TBLS- BCP	Marnee Bolen, TBLS-BCP
Vendor Liaison	Jennifer Miller	Arturo Ortiz
2025 Texas Alliance of Paralegal Associations (TAPA) Planning Committee	Joncilee Miller, ACP	Not applicable

Liaison appointments:

<b>Committee/Organization</b>	<b>Liaison</b>
American Alliance of Paralegals (AAPI)	Guy McGunegle
American Association for Paralegal Education (AAfPE)	Billy Hart
American Association of Legal Nurse Consultants (AALNC)	Jennifer Harris, CP
American Bar Association (ABA)	Marnee Bolen, TBLS-BCP
Council of Chairs	Alice Lineberry, PLS, CP
Office of Court Administration	Kim Goldberg, TBLS-BCP
National Association of Legal Assistants (NALA)	Arturo Ortiz
National Federation of Paralegal Associations (NFPA)	Susi Boss
Secretary of State – Notary Division	Shannon Mendez Smith
Texas Alliance of Paralegal Associations (TAPA)	Alice Lineberry, PLS, CP
Texas Association of Legal Professionals (TALP/NALS)	Maria Sturdy
Texas Board of Legal Specialization (TBLS)	Monty Mayes, TBLS-BCP
Judicial Committee on Information Technology	Pearl Garza
Texas Lawyers for Texas Veterans (TLTV)	Marie E. Boleslawski, ACP
Texas Young Lawyers Association (TYLA)	Heather Ulliman, TBLS-BCP
Texas Lawyers Assistance Program (TLAP)	Alice Lineberry, PLS, CP

Other Appointments:

Representative to State Bar [default President]	Alice Lineberry, PLS, CP
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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
TAJC Working Group on Access to Legal Services for Low-Income Texans	Ellen Lockwood, ACP

### TAPS 2024

TAPS 2024 was held in Denton, Texas at the Embassy Suites Hotel & Convention Center on October 2-4, 2024. The theme was “On Silver Stars We Soar.” Our total attendance was 197, with 179 of those being PD members and the other 18 non-members. We had 60 topics over 72 speakers who addressed a wide variety of topics. Eleven offerings were recorded for our online CLE library.

Our committee was composed of the following people:

<b>Position</b>	<b>Committee Member(s)</b>
Chair	Joncilee Miller, ACP
Secretary, Scholarship, Board Advisor	Alice Lineberry, PLS, CP
PD Coordinator/Meeting Planner	Rhonda Brashears, CP, TBLS-BCP
Speaker Co-Chairs	Heather Ulliman, TBLS-BCP Lisa Pittman
Registrations / Volunteer Coordinator	Marie Boydston
TAPS APP	Patti Giuliano
Marketing	Megan Goor, TBLS-BCP
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

We had 37 exhibiting vendors in our exhibit hall and 9 Sponsoring vendors. We were fortunate to have such a supportive group of vendors. We would not be able to provide TAPS to our members without their support.

On Wednesday evening, a “Welcome to TAPS Opening Night” networking social is always a fun event where our vendors get to visit with our attendees and played a meet and greet game. On Thursday the TAPS attendees and sponsoring vendors enjoyed a social “A Star Studded Mystery” which was a murder mystery dinner -- the attendees participated as actors and were amazing. It was a wonderful event.

We hosted another TBLS Helpful Hints Live with rave reviews!

The Friday morning session was a discussion by Roland Johnson, Texas Access to Justice Board Advisor, regarding the proposal for licensed non-lawyers to provide limited legal services.

On Friday the attendees enjoyed a wonderful presentation *“The Stars Align for the Final Bow”* at the annual meeting luncheon with keynote speaker, State Bar of Texas Immediate Past President Cindy Tisdale. Ms. Tisdale spoke on *“Just Say Yes.” Do not say ‘no’ out of fear. Fear of failing publicly, fear of looking silly, and fear of being rejected should never come into your decision-making process. Take the chance and say “yes.”*

### 2024 Fall Board Meeting

The 2024 Fall Board Meeting was held in Denton, Texas on October 4 and 5, 2024 following TAPS.

General PD business was conducted, and President Lineberry gave her quarterly report. A new Ad Hoc Committee – Texas Access to Justice – was created in order for the PD to follow developments on the proposed paraprofessional licensing by the Texas Supreme Court which was initially expected to take effect on December 1, 2024. The Court delayed the effective date indefinitely to consider public comments and suggested revisions.

The Directors provided informative and entertaining skits on leadership topics.

The President appointed a President–Elect Nominating Committee Chair as well as an Executive Committee Nominating Chair.

### Special Board Meeting

A special board meeting was held via Zoom on October 21, 2024 to discuss and vote on long overdue updates to the Standing Rules.

### Special Board Meeting

A special board meeting was held via Zoom on January 9, 2025 to discuss various items, including the current budget.

### Winter 2025 Board Meeting

The Winter meeting of the Board of Directors was held at the Westin San Antonio North in San Antonio, Texas on February 28 and March 1, 2025.

General PD business was conducted, and President Lineberry gave her quarterly report.

Ellen Lockwood, ACP, RP, presented a very informative board ethics presentation.

Judge Rosie Speedlin Gonzalez presented to the Board on various legal topics, including ethics, AI, and leadership.

Directors reported on the current status of membership, plans to find ways to increase membership in their districts, and current events scheduled for their members.

The Paralegal Division continues to work closely with TBLS to promote the exam. Per the Board’s vote to provide a free one-year membership to non-PD members who passed the exam, TBLS will send out a letter to non-PD members to notify them of the free membership.

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 – Billy Hart
- Treasurer – Maria Sturdy
- Secretary – Marie Boleslawski

Several committee chairs were in attendance at the board meeting and present their reports to the Board.

TAPS 2025 Planning Committee Meeting

The TAPS 2025 Planning Committee met on March 1 and 2, 2025 at the Westin San Antonio North in San Antonio. The planning committee was made up of the following:

<b>Position</b>	<b>Committee Member(s)</b>
Chair	Alice Lineberry, PLS, CP
Board Advisor/Secretary/Scholarship Chair	Pearl Garza
PD Coordinator/Meeting Planner	Rhonda Brashears, CP, TBLS-BCP
Speaker Co-Chairs	Susi Boss Lisa Pittman
Registration	Becky Alldredge
TAPS APP	Patti Giuliano
Marketing	Megan Goor, TBLS-BCP
Socials	Javan Johnson, ACP, TBLS-BCP
Door Prizes	Elaine Simons
Vendors	Jennifer Barnes
Public Member	Frank S. Hinnant, Innovative Legal Solutions
Public Member	Kelsey Clark, File & ServeXpress
Public Member	Jim Hollerbach, Hollerbach & Associates

The Committee agreed on the theme for TAPS as “Your Keys to CLE Live – TAPS 2025.”

The Committee agreed on the essay topic for the two scholarships given each year to be “Why is Civility Important in the Legal Profession.” The scholarships are being given in honor of Len

Hardin, longtime PD webmaster who has continued to help PD at no charge long after his retirement.

### TAPA 2025

The Paralegal Division hosted the Texas Alliance of Paralegal Associations (TAPA) this year. It was held on April 25 and 26, 2025 in Denton, Texas. We had 27 registrants attend the Friday Leadership Development Seminar. Four hours of CLE was presented on Friday on leadership development topics that included ethics. The topics included:

- Ethics for Paralegal Board of Directors
- Leadership: You Can Do It!
- Leading with Integrity

A Friday night networking event was held with bowling. Heavy appetizers were provided. Everyone had a great time getting to know each other from different associations.

On Saturday, 10 associations participated in the TAPA conference sharing ideas about the successes and challenges in the associations.

- Capital Area Paralegal Association
- Dallas Area Paralegal Association
- Denton County Paralegal Association
- Ft. Worth Paralegal Association
- Houston Metropolitan Paralegal Association
- Houston Paralegal Association
- Northeast Texas Association of Paralegals
- San Antonio Paralegal Association
- Williamson County Bar Association – Paralegal Division
- Paralegal Division of the State Bar of Texas

### 2025 Outgoing Board Meeting

The 2025 outgoing Board Meeting was held at the Westin San Antonio North in San Antonio, Texas on June 20 and 21<sup>st</sup>, 2025.

President Lineberry and President-Elect Pearl Garza participated in the Hall of Sections at the State Bar of Texas Annual Meeting in San Antonio on June 19.

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

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

## 2025-2026 Board of Directors

<b>2025-2026 Executive Committee &amp; Officers</b>	
President	Pearl Garza
President-Elect	Kim Goldberg
Treasurer	Maria Sturdy
Secretary	Marie Boleslawski
Parliamentarian	Billy Hart
<b>2025-2026 District Directors</b>	
<i>District 1 Director</i> Amy Rainwater	<i>District 10 Director</i> Marie E. Boleslawski, ACP
<i>District 2 Director</i> Heather C. Ulliman, TBLS-BCP	<i>District 11 Director</i> Shannon Smith
<i>District 3 Director</i> Susan Davis	<i>District 12 Director</i> Jennifer Harris, CP
<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> Letty Rodriguez
<i>District 7 Director</i> Marnee Bolen, TBLS-BCP	<i>District 16 Director</i> Guy McGunegle

Outgoing Director Arturo Ortiz was recognized and presented with a plaque for his service.

### TAPS 2025

TAPS 2025 was held in San Antonio, Texas at the Westin San Antonio North in San Antonio on September 24-26, 2025. The theme was “Your Keys to CLE Live – TAPS 2025.” Our total attendance was 176, with 149 of those being PD members and the other 27 non-members. We had 60 topics over 74 speakers who addressed a wide variety of topics. Eleven offerings were recorded for our online CLE library.

Our committee was composed of the following people:

<b>Position</b>	<b>Committee Member(s)</b>
Chair	Alice Lineberry, PLS, CP
Board Advisor/Secretary/Scholarship Chair	Pearl Garza
PD Coordinator/Meeting Planner	Rhonda Brashears, CP, TBLS-BCP
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Socials	Javan Johnson, ACP, TBLS-BCP
Door Prizes	Elaine Simons

Vendors	Jennifer Barnes
Public Member	Frank S. Hinnant, Innovative Legal Solutions
Public Member	Kelsey Clark, File & ServeXpress
Public Member	Jim Hollerbach, Hollerbach & Associates

We had 35 exhibiting vendors in our exhibit hall and 9 Sponsoring vendors. We were fortunate to have such a supportive group of vendors. We would not be able to provide TAPS to our members without their support. We sold all booths and had requests from at least five additional vendors wanting to purchase a booth.

On Wednesday evening, the “Set the TAPS Tempo on Opening Night” networking social was held. It is a time for our vendors to network with our attendees. A match the song/artist was played and door prizes were given. On Thursday the TAPS attendees and sponsoring vendors enjoyed a social, “The Beat Goes On.” It was an up-tempo evening of networking brought to our attendees by Felix and Fingers in a dueling piano show-off. Everyone had a great time; there was singing and dancing, as well as a costume contest. The social was well attended.

We hosted another TBLS Helpful Hints Live for attendees who were interested in knowing more about the TBLS exam. Molly Galvez from TBLS was on site to answer questions.

The Friday morning special session was a panel discussion by Justice Lori Massey Brissette, Justice Todd McCray, Justice Velia J. Meza, Justice Irene Rios, and Justice Adrian A. Spears, II.

On Friday the attendees enjoyed a wonderful presentation “*The Encore*” at the annual meeting luncheon with keynote speaker, Honorable Adrian A. Spears II who spoke on “Being the Best Paralegals in Your Role in the Judicial System.”

Our charity was “Stand with Santos.” The funds raised benefit the Texas Access to Justice Foundation, a nonprofit organization that provides grants to organizations statewide offering free legal assistance to low-income Texas. The funds raised during this time were going specifically to help those affected by the 2025 Central Texas floods.