HOUSTON PARALEGAL ASSOCIATION

An Affiliate of NALA-The Paralegal Association

Annual Report to NALA

June 1, 2019
HOUSTON PARALEGAL ASSOCIATION

2019 Annual Report to NALA

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# Houston Paralegal Association

## Executive Committee & Committee Chairs Roster

### 2018-2019

### Executive Committee

<table>
<thead>
<tr>
<th>Position</th>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>President</strong></td>
<td>Linda Carrette, <em>ACP, TBLS-BCP Civil Trial Law</em></td>
<td><a href="mailto:lcarrette@mac.com">lcarrette@mac.com</a></td>
</tr>
<tr>
<td><strong>President-Elect</strong></td>
<td>Sharon D. Jones, <em>ACP</em></td>
<td><a href="mailto:sdjhpa@yahoo.com">sdjhpa@yahoo.com</a></td>
</tr>
<tr>
<td><strong>1st Vice President – CLE Committee Chairs</strong></td>
<td>Jonathan Chan, <em>CP</em></td>
<td><a href="mailto:jonathanchan.tx@outlook.com">jonathanchan.tx@outlook.com</a></td>
</tr>
<tr>
<td><strong>Secretary</strong></td>
<td>Sally Almendarez</td>
<td>sally <a href="mailto:almendarez@cao.hctx.net">almendarez@cao.hctx.net</a></td>
</tr>
<tr>
<td><strong>2nd VP – Membership Committee Chair</strong></td>
<td>LaKeisha Simmons, <em>CP</em></td>
<td><a href="mailto:lakeisha_simmons@justex.net">lakeisha_simmons@justex.net</a></td>
</tr>
<tr>
<td><strong>Treasurer – Finance Committee Chair</strong></td>
<td>Jennifer Armendariz</td>
<td><a href="mailto:jenarmendariz@live.com">jenarmendariz@live.com</a></td>
</tr>
<tr>
<td><strong>3rd Vice President – Public Relations Committee Chair</strong></td>
<td>Ruth Conley, <em>ACP</em></td>
<td><a href="mailto:houtxruth@gmail.com">houtxruth@gmail.com</a></td>
</tr>
<tr>
<td><strong>Parliamentarian, Election Committee Chair</strong></td>
<td>Owen Jirka</td>
<td><a href="mailto:owen.jirka@cao.hctx.net">owen.jirka@cao.hctx.net</a></td>
</tr>
<tr>
<td><strong>NALA Liaison</strong></td>
<td>Montye Holmes, <em>ACP, TBLS-BCP Civil Trial Law</em></td>
<td><a href="mailto:mholmes@hirschwest.com">mholmes@hirschwest.com</a></td>
</tr>
</tbody>
</table>

### CLE Committees

- **Annual CLE Committee:**
  - Exhibitors Committee Chair: Gina Holder
    - hgholder@me.com
  - Speakers Committee Chair: Mary Shiloh, *TBLS-BCP, Bankruptcy Law*
- **Conference Committee:**
  - All Board Members

### Job Bank:

- Jennifer Armendariz
  - jenarmendariz@live.com

### CP Study Group:

- Sandra-Lee Jordan, *CP*
  - sandra.jordan@corelab.com
President’s Report
Linda A. Carrette, ACP, TBLS-BCP Civil Trial Law
HPA President
2018 – 2019

As President of the Houston Paralegal Association, I preside over all Executive Committee meetings and membership meetings and maintain files of HPA records and activities during my term (September 1, 2018 through August 31, 2019). HPA is an affiliated association of NALA-The Paralegal Association, and we encourage continued education and certification through both NALA and the Texas Board of Legal Specialization for Board Certified Paralegals.

HPA’s annual meeting and election of officers was held on August 23, 2018, at the Homewood Suites by Hilton downtown Houston. The slate of candidates was presented and the electronic voting results were announced.

This is a momentous year for HPA, as we celebrate our 20th year serving the Houston paralegal community. Our 2019 annual meeting with also serve as our 20th anniversary event, and we look forward to the celebration with our members! Our membership is steadily increasing each month and our membership dues continue to be held at an affordable price for individual membership at $35.00. We also offer student memberships at a discounted rate for students enrolled in paralegal certificate or paralegal degree programs.

HPA’s primary goal is to bring quality continuing legal education to our profession and we hold monthly Brown Bag CLE events at no cost to the paralegals who attend. We have the gracious support of various law firms offering conference rooms to our association at no cost and our Sustaining Members support the event as dessert sponsors. We continue to hold our annual full-day Spring CLE in Galveston, and this year is our 16th annual event, where we offer a variety of topics to both working paralegals and students. This year, our slate of speakers includes presentations in the areas of trial practice and litigation, bankruptcy, transactional law, corporate law, and of course, ethical considerations, particularly in working with clients. We have also secured a speaker to address billing dilemmas, specifically, how to bill so that clients will pay. We actively seek out attorneys and other professionals to bring both interesting and educational information to each of our CLE events to ensure all of our substantive topics are approved for CLE credit by either NALA, TBLS, or both organizations. HPA also encourages and supports TAPS and other local CLE events sponsored by other associations.

HPA leads a study group for the NALA CP Examination with volunteers from our members who have achieved the CP or ACP credential helping to mentor others who are studying for the exam. Our instructors not only present sessions on each of the topics covered by the CP Exam, but we work directly with the study group participants to mentor them one-on-one when necessary to help encourage each person on their journey toward a successful completion of the CP Exam.

HPA maintains a social media presence with a website, a Facebook page (with now over 1,000 “likes”), a LinkedIn page, and we currently use social media, as well as e-blasts, to communicate with our membership on a regular basis. HPA maintains a job bank on its website and provides networking opportunities to its membership by sponsoring several social events and activities throughout the year, including a holiday social in December, a Go Texan social in February, a spring social in April in connection with our annual CLE, summer socials in June and July, and a fall social in August or September.
Three of our board members attended the NALA Conference & Expo in St. Louis, MO, held July 11-13, 2018. HPA was selected by NALA as the annual Affiliate presentation at the conference, and board members Montye Holmes, Linda Carrette, and Ruth Conley spoke on the topic of “How to Grow Your Association’s Membership with a Stellar CLE Conference.” We shared our pointers and tricks on putting together a very profitable, successful CLE as a local association, and the presentation was very well received. In fact, NALA representatives commented on how much they gleaned from our session, and planned to implement several of our tips in event planning! Four HPA board members, including our President Linda Carrette, our NALA liaison Montye Holmes, our President-Elect Sharon Jones, and our Third Vice-President Ruth Conley, will be traveling to Scottsdale, AZ to attend the 2019 NALA Conference & Expo on July 11-14. We look forward to the Grand Canyon, award-winning shopping and dining, some R&R on the Westin Kierland Resort’s lazy river, and of course, four days of stellar education.

On October 23, 2018, HPA sponsored a Texas Paralegal Day luncheon at the Homewood Suites in downtown Houston, and our keynote speaker was Greta Zeimetz, CAE, who spoke to us on “Team Excellence,” and the importance of being both a leader and an effective team member. Despite a very stormy day, we had a great turnout of over 60 paralegals present.

HPA continues to support local charities, including the Star of Hope. At our Texas Paralegal Day event, we collected underwear, socks, personal care items, and sippy cups for the Star of Hope. At HPA’s holiday social in December, our members donated hats, gloves, scarves, and made cash donations to Star of Hope. In February, HPA purchased items for the High School for Law and Justice, a Title 1 school. Personal care items, school supplies, “hoodies” and metro cards were donated to students in need for the remainder of the school year.

HPA is proud to have played a small part in supporting these worthy causes and will continue to seek out organizations which will directly benefit from our members’ generosity.

Customarily, our association is represented at TAPA by the HPA President and President-Elect. Unfortunately, this year TAPA fell on the weekend of my Zeta Tau Alpha chapter’s 80\textsuperscript{th} anniversary celebration and reunion, so I will be in Oxford, Mississippi, celebrating with my Zeta “sisters.” I am sorry to miss the opportunity to represent HPA at TAPA, but look forward to hearing all about your accomplishments through our President-Elect Sharon Jones and NALA Liaison Montye Holmes upon their return to Houston.
President-Elect’s Report

Sharon Jones, ACP
HPA President-Elect
2018 – 2019

As President-Elect, I attend all monthly Board Meetings, and support the President and HPA in planning and implementing all activities, which include CLE brown bag luncheons and annual full-day programs, networking socials, CP Exam study groups, and various community events supporting local charities.

At our annual Board Retreat in August 2018, President Carrette assigned me to facilitate a community support event for Texas Paralegal Day and a Career & Technology Workshop. The collection drive for critical need items for a local charity, Star of Hope, at our 2018 Texas Paralegal Day was successful and well-supported by our members and vendors. This year, I am participating on a committee, formed from the three Houston paralegal associations (Houston Corporate Paralegal Association, Houston Metropolitan Paralegal Association, & HPA), in the logistics/planning for the first joint associations’ Texas Paralegal Day Luncheon on October 23, 2019. Along with several board members, we are currently in the planning stages to provide a Career & Technology Workshop for career paralegals and paralegal students on September 14, 2019.

I was unable to attend the NALA Conference & Expo in St. Louis last July, but will attend the 2019 NALA Conference & Expo in Scottsdale, AZ this July, along with several other HPA board members.

HPA will celebrate its 20th Anniversary on August 15, 2019. I, along with Ruth Conley and Montye Holmes, am overseeing the planning for this milestone event.

I am excited for the opportunity to represent HPA at this year’s TAPA meeting.
First Vice President/Continuing Legal Education Chair Report
Jonathan Chan, CP
1st Vice President – Continuing Legal Education
2018 – 2019

As First Vice President/Continuing Legal Education Chair, my responsibility is to organize continuing legal education opportunities for our members in the form of Brown Bag CLE Luncheons and our Annual Spring CLE Seminar. Brown Bag speakers are invited to give a one hour presentation and attendees earn 1 hour of CLE credit. The Annual Spring CLE Seminar is an all-day event held in April and attendees can earn up to 6 hours of CLE credit. CLE events are open to both members and non-members.

The CLE Seminar Speaker Committee is comprised of Mary Shiloh and me as First VP of CLE. The CLE Seminar Conference Committee includes all HPA board and committee members. They all work closely with me to obtain speakers for our Spring CLE seminar. In preparation for our spring seminar, the CLE Committee meets after each board meeting, and will begin to meet weekly via conference call to make final preparations for our event.

Below is a summary of the CLE offered throughout 2018-2019. This year's upcoming Spring CLE seminar is scheduled for Friday, April 26, 2019, at the Galveston Island Convention Center in Galveston, Texas, and the conference agenda is included. Our event has been approved by NALA for 6.0 hours of CLE credit, and approved by TBLS for 6.0 in civil trial law and bankruptcy law, 5.0 hours in personal injury trial law and criminal law, 4.0 hours in family law, and 3.0 hours in estate planning and probate, real estate law, and oil, gas and mineral law.

2018-2019 HPA BROWN BAG LUNCHEONS

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<thead>
<tr>
<th>Date</th>
<th>Speaker/Topic</th>
<th>Location</th>
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<tbody>
<tr>
<td>January 24, 2018</td>
<td>Sandra Hachem/Civil Appellate Practice</td>
<td>Andrews Kurth Kenyon, LLP</td>
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<td>Chase Tower</td>
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<td></td>
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<td>600 Travis, Ste. 4200</td>
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<tr>
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<td></td>
<td>Houston, TX 77002</td>
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<tr>
<td>February 14, 2018</td>
<td>Trey Peacock/Going Paperless In Your Practice</td>
<td>Andrews Kurth Kenyon, LLP</td>
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<td>600 Travis, Ste. 4200</td>
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<td>Houston, TX 77002</td>
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<tr>
<td>March 14, 2018</td>
<td>David Isaack/Parallel Civil &amp; Criminal Proceedings</td>
<td>Andrews Kurth Kenyon, LLP</td>
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<td>April 27, 2018</td>
<td>HPA Annual CLE</td>
<td>Galveston Island Convention Center</td>
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<td>Hilton Galveston Island Resort</td>
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<td>May 16, 2018</td>
<td>Judge Jeffrey Norman/U.S. Bankruptcy Court</td>
<td>U.S. District &amp; Bankruptcy Court</td>
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<td></td>
<td></td>
<td>Southern District of Texas</td>
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<td></td>
<td></td>
<td>515 Rusk St., Courtroom 401</td>
</tr>
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<td></td>
<td>Houston Texas 77002</td>
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<tr>
<td>Date</td>
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<td>August 29, 2018</td>
<td>Noel Kersh/Forensic Issues for Employment Cases</td>
<td>Winstead, PC&lt;br&gt;JP Morgan Chase Tower&lt;br&gt;600 Travis, 52nd Floor&lt;br&gt;Houston, Texas 77002</td>
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<td>September 27, 2018</td>
<td>Robert Summers/Texas Notary Issues &amp; Updates</td>
<td>Winstead, PC&lt;br&gt;JP Morgan Chase Tower&lt;br&gt;600 Travis, 52nd Floor&lt;br&gt;Houston, Texas 77002</td>
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<td>October 23, 2018</td>
<td>Greta Zeimetz, CAE (NALA)/Team Excellence – Leadership Skills</td>
<td>Homewood Suites by Hilton Downtown&lt;br&gt;710 Crawford St.&lt;br&gt;Houston, Texas 77002</td>
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<tr>
<td>November 27, 2018</td>
<td>Judge Caroline Baker/Speech Based Torts: Libel, Slander, Business Disparagement and Invasion of Privacy</td>
<td>Harris County Civil Courthouse&lt;br&gt;201 Caroline, 14th Floor – 295th District Courtroom&lt;br&gt;Houston, Texas 77002</td>
</tr>
<tr>
<td>February 27, 2019</td>
<td>Marilyn Burgess/News &amp; Technology Updates from District Clerk’s Office</td>
<td>Harris County Attorney’s Office&lt;br&gt;1019 Congress, 16th Floor – Driscoll Court Room&lt;br&gt;Houston, Texas 77002</td>
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<tr>
<td>March 27, 2019</td>
<td>Kristina Cunningham, Esq./”You’ve Been Served”: Subpoenas, Garnishments and Levies</td>
<td>Winstead, PC&lt;br&gt;JP Morgan Chase Tower&lt;br&gt;600 Travis, 52nd Floor&lt;br&gt;Houston, Texas 77002</td>
</tr>
<tr>
<td>April 26, 2019</td>
<td>HPA Annual CLE <em>(see Agenda attached)</em></td>
<td>Galveston Island Convention Center&lt;br&gt;Hilton Galveston Island Resort</td>
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CONFERENCE AGENDA

7:30 - 8:30  Registration (Pre-function Area - 1st Floor)

7:30 – 3:30  Exhibitors Hall Open (Pre-function Area - 1st Floor)

8:00 - 10:00  Continental Breakfast (Pre-function Area - 1st Floor)

8:30 – 8:40  Welcome from HPA President and General Announcements

8:40 – 9:40  How to Bill So Clients Will Pay
Dustin Fessler, Esq., Roberts Markel Weinberg Butler Hailey PC, Houston, TX

9:40 – 10:00  Mid-Morning Break (Pre-function Area - 1st Floor)

10:00 - 11:00  TRACK 1
Appellate Procedure
Honorable Julie Countiss
Justice, First Court of Appeals
Houston, TX

11:00 – Noon  Top 10 Mistakes at Trial
Sammy Ford, IV, Esq.
Ahmad, Zavitsanos, Anaipakos,
Alavi & Mensing, PC
Houston, TX

12:00 – 1:15  Luncheon (Pre-function Area - 2nd Floor)

1:15 – 2:15  TRACK 2
What Part of No Don’t You Understand – Automatic Stay
& Discharge Injunction Violations in Bankruptcy
Chuck Newton, Esq.
Charles Newton & Associates
The Woodlands, TX

1:15 – 2:15  Stowers: Ins and Outs
Fred Shuchart, Esq.
Cooper & Scully, P.C.
Houston, TX

2:15 – 3:15  Preparing Witnesses and Deposing
Individuals with PTSD
Rachel V. Rose, MBA, Esq.
Rachel V. Rose - Atty at Law, PLLC
Houston, TX

3:15 – 3:40  Mid-Afternoon Break (Pre-function Area - 1st Floor)

3:40 – 4:40  Five Star Counsel: Ethical Client Service Lessons
John Strohmeyer, Esq., Strohmeyer, PLLC, Houston, TX

4:30 - 5:30  Bingo Grand Prize Winners Announced and Seaside Social (must be present to win)

This advanced full-day conference is taught by attorneys, is specifically designed for paralegals and other legal professionals, and includes time for your questions. Fees include breakfast, lunch, afternoon snack and course materials. Wi-Fi in the Conference Center is complimentary.

NALA approved for 6.0 substantive CLE hours credit, including 1 hour of Ethics CLE credit. TBLS approval for the following CLE credit: 6.00 Bankruptcy Law, 6.00 Civil Trial Law, 5.00 Criminal Law, 3.00 Estate Planning & Probate Law, 4.00 Family Law, 5.00 Personal Injury Trial Law, 3.00 Real Estate Law, and 3.00 Oil, Gas & Mineral Law.

Mail Registration Deadline:  April 19, 2019. All registration forms post-marked after April 19, 2019, will incur a $10 late registration fee.
Second Vice President/Membership Chair Report
LaKeshia Simmons, CP
2nd Vice President – Membership
2018 – 2019

HPA Membership as of March 4, 2019

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<thead>
<tr>
<th>Type</th>
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<tbody>
<tr>
<td>Active</td>
<td>91</td>
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<tr>
<td>Associate</td>
<td>31</td>
</tr>
<tr>
<td>Sustaining</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>134</td>
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</tbody>
</table>

HPA offers three types of memberships:

**Active** - Persons who are qualified by education, training or work experience who are employed or retained by a lawyer, law office, corporation, governmental agency or other entity and who perform specifically-delegated, substantive legal work for which a lawyer is responsible.

**Associate** - Persons who are employed as paralegal trainees and/or students enrolled in a paralegal program, and paralegals meeting criteria for Active Membership but who are not currently employed under the direct supervision of an attorney.

**Sustaining** - Firms, agencies, corporations or other entities interested in supporting the paralegal profession and this Association.

I was re-elected as Second Vice President/Membership Chair in August 2018 for the 2018-2019 term.

My duties include providing a monthly membership report to the board, recruiting prospective members by answering all inquiries regarding membership in the association, maintaining the membership information on the HPA database which includes confirming and updating contact information, applying dues for new members as well as renewing current memberships, entering information for new members.
Third Vice President/Public Relations Chair Report

Ruth Conley, ACP
3rd Vice President – Public Relations
2018 – 2019

As Third Vice President, I am charged with the responsibility of promoting and marketing HPA at events by advertising and other means on a local, state-wide, and national level. I am responsible for promotional items of HPA and coordinating socials.

I have made a concentrated effort to post on HPA’s Facebook page on a monthly basis – photos from HPA socials, including door prize winners and sponsors, and posts from NALA and PD-District 1. These efforts were rewarded when the “likes” to our page crossed over the 1000 mark in February.

At the October 2018 Texas Paralegal Day luncheon, HPA gave each attendee embossed business card cases, along with legal pads and stylus pens, with the HPA logo. Each year we seek out new items for give-aways at HPA’s annual CLE conference, and this year our give-away will include an HPA business brief bag embossed with our logo and the years “1999-2019,” in order to not only help promote HPA, but also thank our members for their support of our organization the last two decades.

HPA will have an exhibitor booth at the NALA convention in July 2019 as an affiliate association and will provide branded items to give away to promote HPA, along with materials to promote membership in HPA.

Note, the 2018 HPA affiliate booth at the NALA conference in St. Louis, held at the Westin at the Ballpark was a huge hit with our theme of “Paralegals – Knocking It Out of the Park,” and despite being in Cardinals territory, we decorated our affiliate table with Houston Astros’ World Series items. We gave away Astros swag, let attendees get a close-up view of our replica World Series trophy and championship ring, which drew a large crowd, and of course, we dressed for the game in our World Series Astros’ jerseys, and threw out Cracker Jacks to promote our organization.
Secretary’s Report
Sally Almendarez
HPA Secretary
2018 – 2019

This is my first year to serve on the HPA Board of Directors. As Secretary of the Houston Paralegal Association, I am responsible for recording the minutes of the monthly Executive Committee meetings. I am also responsible for preparing final and corrected meeting minutes for approval at the Executive Committee meetings. In the absence of the Parliamentarian, I maintain the orderly progression of the Meetings.

I maintain the permanent minutes of the association and I am familiar with the Robert’s Rules of Order.

In addition to my duties as HPA Secretary, I have served as our association’s liaison to the Star of Hope, delivering all donations and obtaining appropriate receipts for our financial records. Currently, I am also serving as a committee member of HPA’s Career Day Symposium, which is in the planning stages, and tentatively set for September 2019.
As Treasurer of the Houston Paralegal Association, I am responsible for the association’s financial matters, as stated in our By-laws (reinstated 2008), including depositing all funds and issuing all disbursements on behalf of the association. I also prepare all financial reports to state and federal entities as required, and I prepare a Treasurer’s Report for our monthly board meetings and an annual Financial Report for our Annual Meeting.

Since January 2011, our PayPal account has been available on our web site to accept payments for membership fees and CLE events. In 2015, we also established a Square account to accept credit card payments on site at our events. We have noticed a steady increase in the use of PayPal, as people are relying more heavily on electronic payment means and use of credit cards, rather than checks, for payment of dues and event registrations.
Parliamentarian’s Report
Owen Jirka
HPA Parliamentarian
2018 – 2019

This is also my first year to serve on the HPA Board of Directors. As Parliamentarian of the Association, I report to the President and provide advice, upon request, to the President and the Executive Committee on parliamentary procedure. I serve as the final appeal to provide explanations or advice, but not rulings, when two or more groups have differing interpretations of the rules governing a meeting. I serve as a non-interventionist and sit in areas for visual access to the President. I am to be available to confer with the President as needed. Every meeting is governed by the Association’s Bylaws, HPA’s Board Code of Conduct & Agreement and Robert’s Rules of Order.

Additional duties handled by the Parliamentarian are:

- To oversee time management expectations at each Executive Committee Meeting;
- To make impartial and consistent so as no member’s basic rights are adversely affected;
- To take notes at each meeting to assist with proofreading and coordinating any corrections to the minutes;
- To approve check requests before payment by the Treasurer;
- To perform the annual new Board nominations and elections; and
- To perform other duties as requested.
As the NALA liaison for HPA, my responsibility is to communicate the activities of NALA to both the HPA board as well as its members. The NALA liaison must also prepare and submit reports to NALA on behalf of HPA, as required, and work with the NALA Affiliated Associations Director in relaying information pertaining to HPA as an affiliate association. In addition, as a NALA affiliate, HPA sends a delegate to the NALA annual meeting and conference each year. The NALA liaison not only observes NALA’s annual meeting, but also participates in the election process by voting for officers and other matters appearing on the ballot.

NALA has undergone many changes since 2015, most notably, completely revamping its CP Examination process as of last year. In addition, NALA has launched an updated web site, and has reduced rates for their NALA Campus LIVE! Webinar education presentations. NALA has recently published a new review manual to assist paralegals in studying for the new format CP Exam.

In 2018, HPA was honored to be named to present the Affiliate Presentation for the conference. In addition, HPA hit a “homerun” during the Affiliates Showcase that evening, showing our pride in our own World Series Champion Houston Astros, with our theme, “Paralegals – Knocking It Out of the Park”! Our NALA liaison, Sharon Jones, was unable to attend the NALA Conference & Expo held on July 11-13, 2018 in St. Louis; however, I, along with Linda Carrette and Ruth Conley, attended the event on behalf of HPA.

As NALA liaison, I will be representing HPA, along with other board members, at the NALA Conference in Scottsdale, AZ July 11-14, 2019. NALA has revamped the format of the annual meeting and conference, and the CLE will take place Thursday through Saturday, with a special Paralegal Technology Workshop being offered on Sunday.

It is a very exciting time to be a NALA affiliated association. I am proud to serve as HPA’s NALA liaison for 2018-2019.