

2017

ANNUAL REPORT

 N NALA

Table of Contents

Table of Contents	2
To Our Members	3
Mission statement	3
Strategic Highlights	3
Financial Highlights	3
Operating Highlights	3
Looking Ahead	3
Financial Summary	4
Net assets At year end	4
Summary of Revenue & Expenses	4
Outlook for 2017-2018	4
Certifications	5
Certified Paralegal Certification	5
Advanced Certified Paralegal Certification	7
Membership	9
Education	10
Education	10
NALA's Board of Directors	13
Board of Directors'	14
NALA's Certifying Board	15
Advanced Paralegal Certification (APC) Board	16
Committee Reports	17
Continuing Education Council (CEC)	17
Professional Development Council (PDC)	18
Company Information	19
NALA Headquarters Staff	19

To Our Members

MISSION STATEMENT

NALA leads the paralegal profession by providing a voluntary certification program, continuing legal education, and professional development programs for all paralegals.

STRATEGIC HIGHLIGHTS

NALA's Board of Directors continues to evaluate the changing landscape for paralegals to ensure that we continue to be the leader for the paralegal profession. We monitor the industry closely for external factors and influences to ensure that we are adequately prepared for change.

FINANCIAL HIGHLIGHTS

This past fiscal year, we saw an increase in revenue and a decrease in expenses. NALA staff and volunteers work diligently to save money, while investing in necessary areas, such as technology.

OPERATING HIGHLIGHTS

NALA continues to work on improving its technology infrastructure. We are updating our technology to serve our members and our customers more efficiently and effectively.

LOOKING AHEAD

With NALA's dedicated and passionate Board of Directors, committees, and staff, we will continue to increase and improve our ability to lead the paralegal profession and to make NALA invaluable to all paralegals.

Cassandra Oliver, ACP
NALA Board President

Greta Zeimetz, CAE
Executive Director



Financial Summary

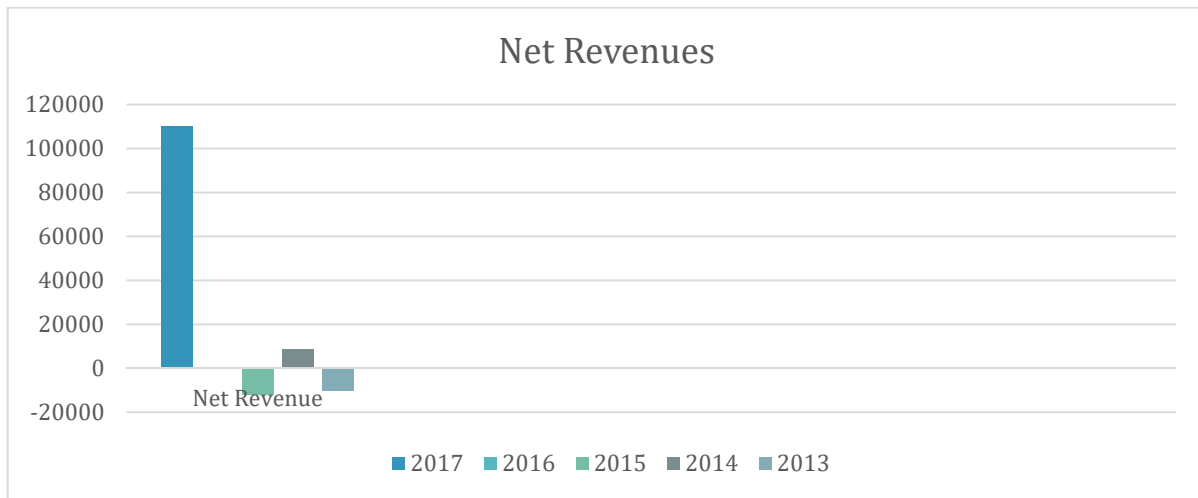
These figures for 2017 may yet be modified to take into account the auditor’s report and adjustments to fixed assets and depreciation, which as of printing has not yet been completed. Please note that a current year audit can cause restatements of prior years. The numbers reflected below include any restatements made by the auditors, which may be different than originally published.

NET ASSETS AT YEAR END

Assets	2017	2016	2015	2014	2013
Total Net Assets	\$1,038,730	\$990,100	\$984,398	\$870,768	\$746,325

SUMMARY OF REVENUE & EXPENSES

	2017	2016	2015	2014	2013
Revenues	\$1,764,507	\$1,666,804	\$1,649,298	\$1,641,106	\$1,558,291
Expenses	\$1,655,790	\$1,666,298	\$1,661,422	\$1,516,663	\$1,598,764
Net	\$110,200	\$506	(\$12,124)	\$8,876	(\$10,473)



OUTLOOK FOR 2017-2018

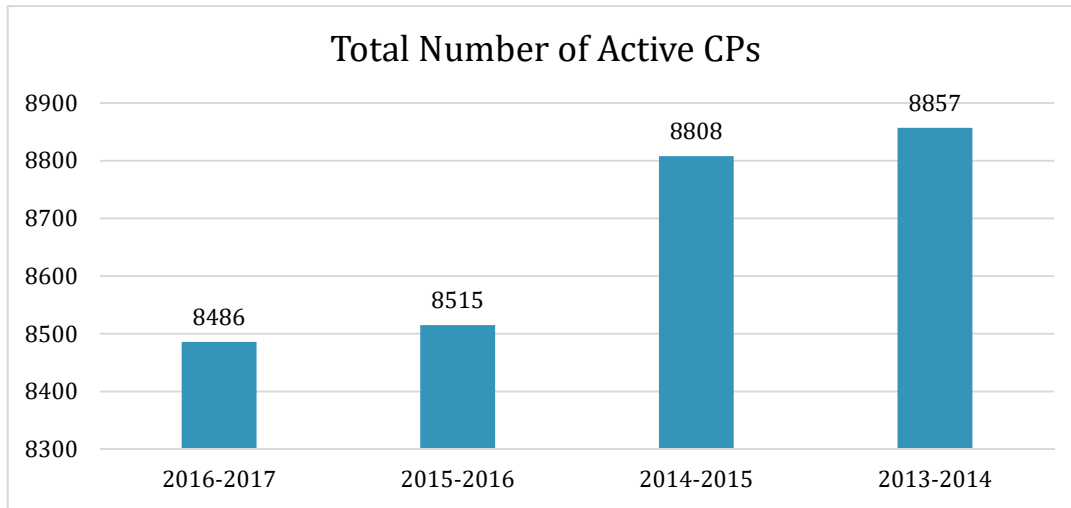
The Board of Directors remains conservative with projects for 2017. Investments in technology, which are necessary to move the association forward, are costly, but necessary. In addition, NALA has added additional staff to support operations and growth.

Certifications

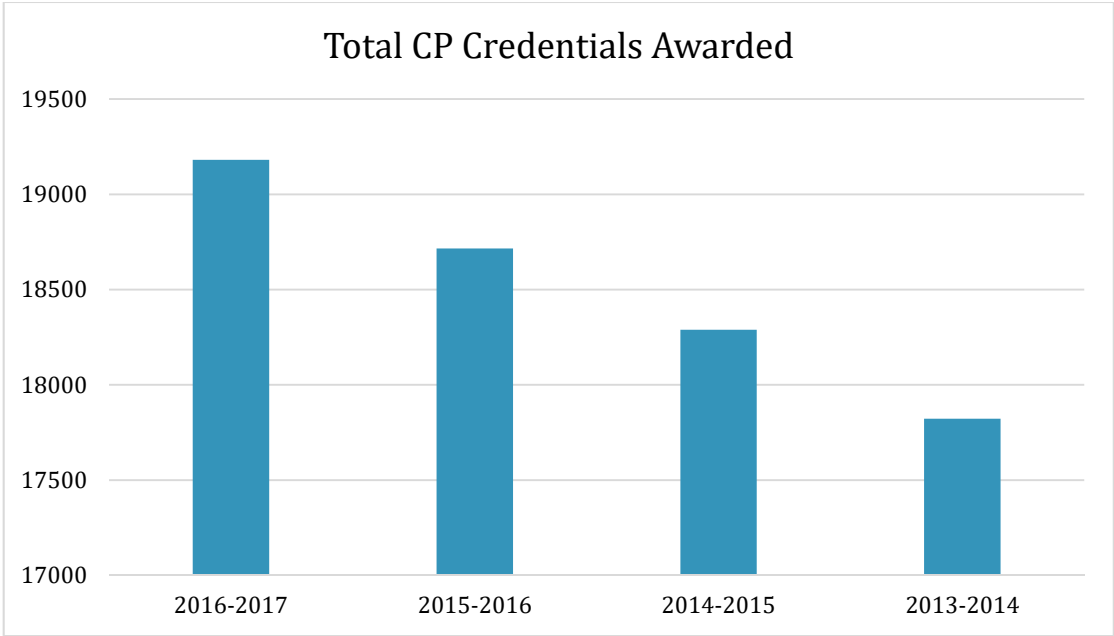
NALA offers two certifications – the Certified Paralegal (CP) and the specialty certification the Advanced Certified Paralegal (ACP).

CERTIFIED PARALEGAL CERTIFICATION

The charts on this page provide detail on the Certified Paralegal (CP) certification.



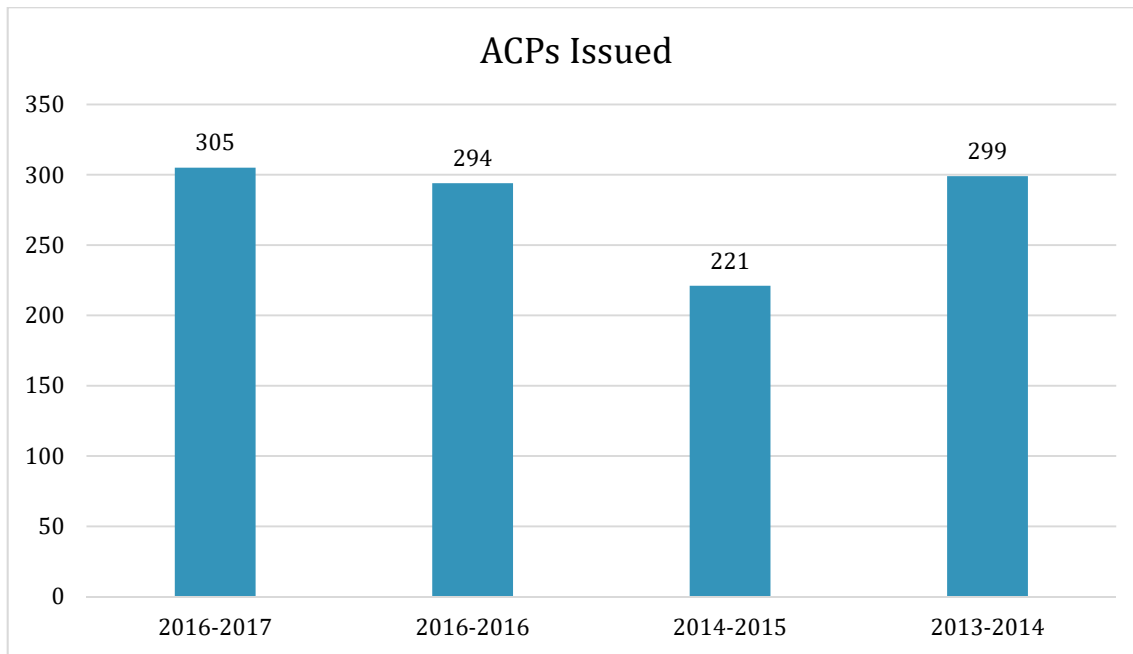
The total number of active CPs is declining slightly due to the flexibility of the completion of all exam parts and the amount of retakes. Overall, the number of new examinees for the past five years has continued to increase slightly.



ADVANCED CERTIFIED PARALEGAL CERTIFICATION

In 2015-2016, the ACP courses were updated; however, additional modifications and updates were necessary. After the updates the courses will be moved to our learning management system that was implemented in 2016. This move and the enhancements being created will provide for much more interaction and engagement throughout the courses and enhance the overall learning for participants.

The following chart lists the total number of Advanced Certified Paralegal specialty credentials issued. The total number of ACPs issued through the end of fiscal year 2017 is 4027.



- ACP certification is for Certified Paralegals and is focused on mastery of specific course material developed under the direction of the Advanced Paralegal Certification Board.

- Many Certified Paralegals seek multiple advanced certifications as their work assignments change.

“I have never regretted taking the additional coursework; I recommend the certification for those who would advance their career, and to gain confidence in additional areas.”

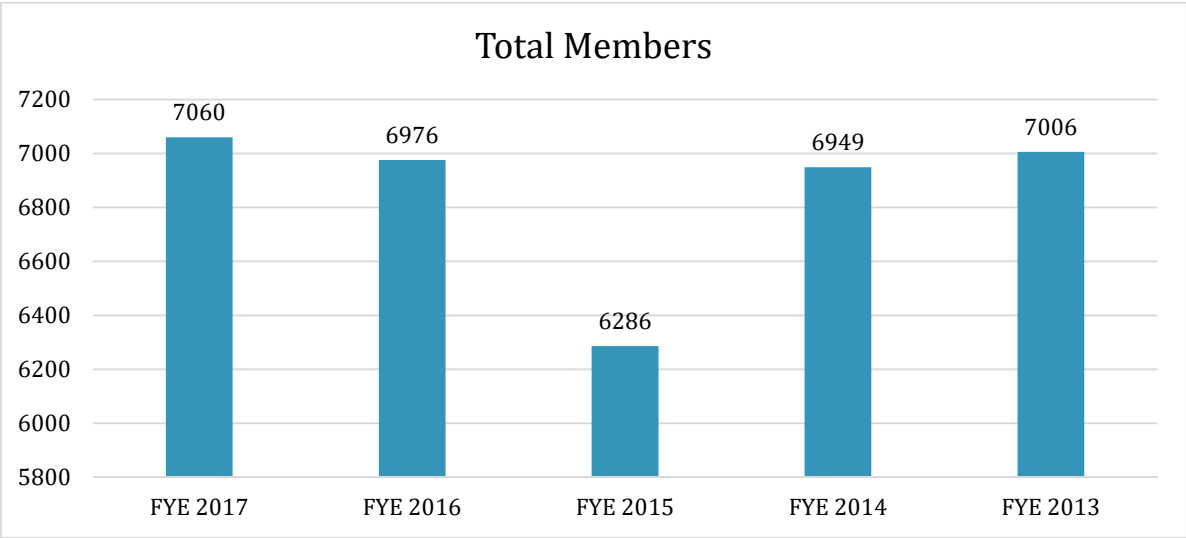
– Sharlene (ACP NALA Member)

“I enjoy having the advanced knowledge necessary to gain employment opportunities I previously would never had achieved”

– R.A. (ACP NALA Member)

Membership

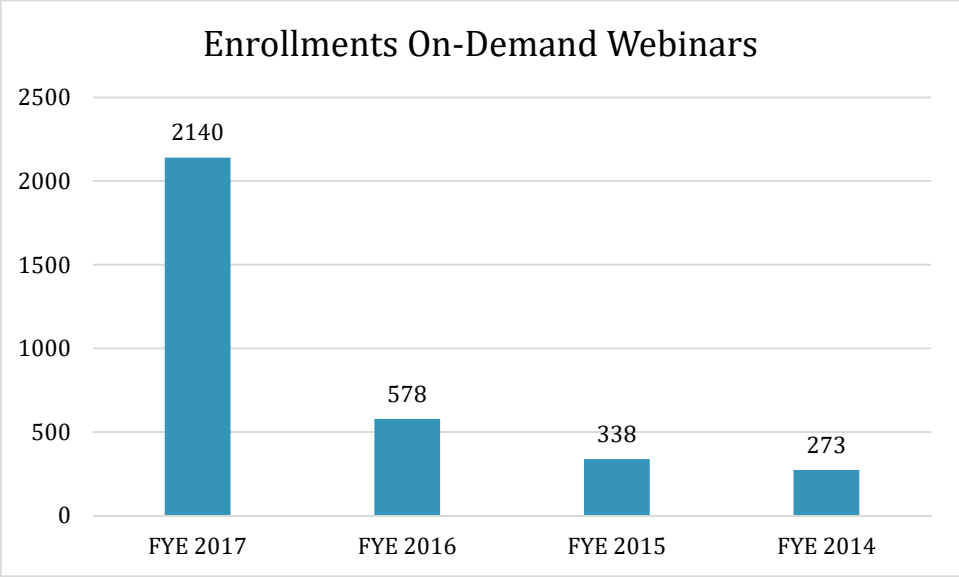
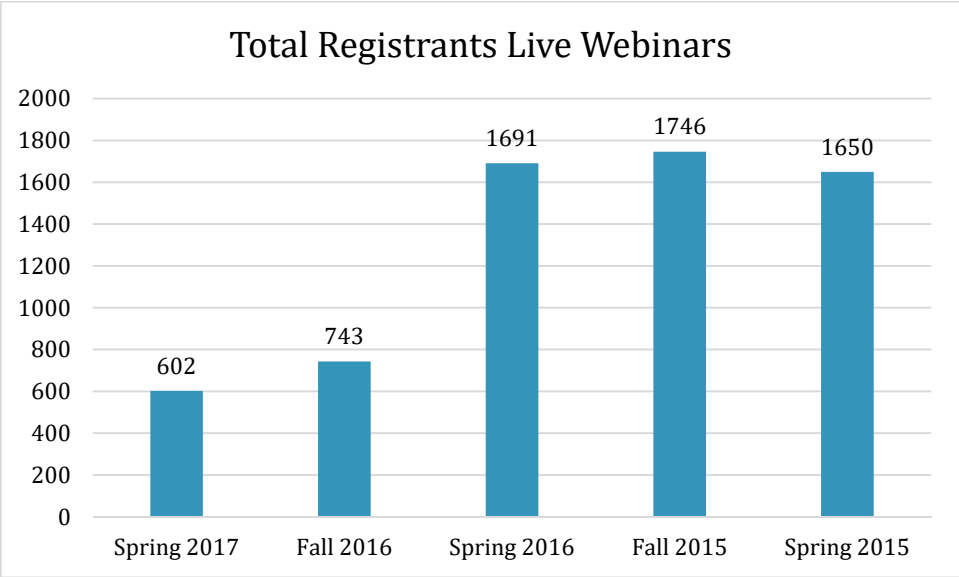
NALA’s membership is made up of several classification types. The chart below illustrates the total members of all of the classification types at the end of each fiscal year.

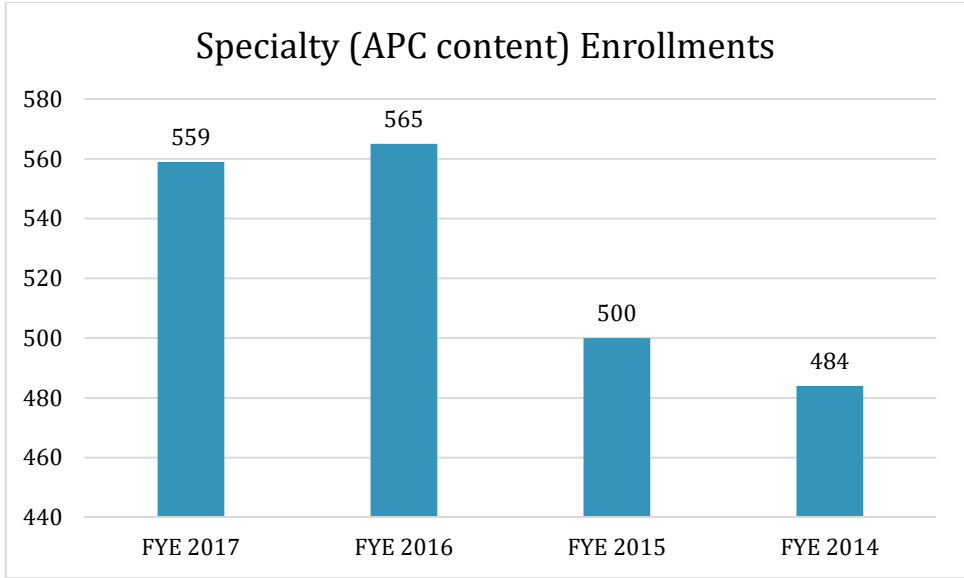


Education

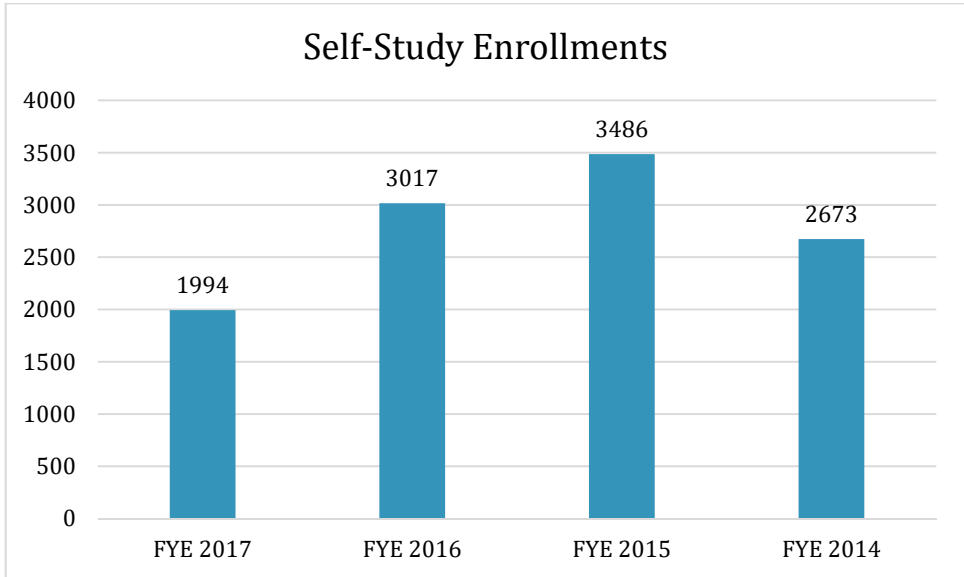
EDUCATION

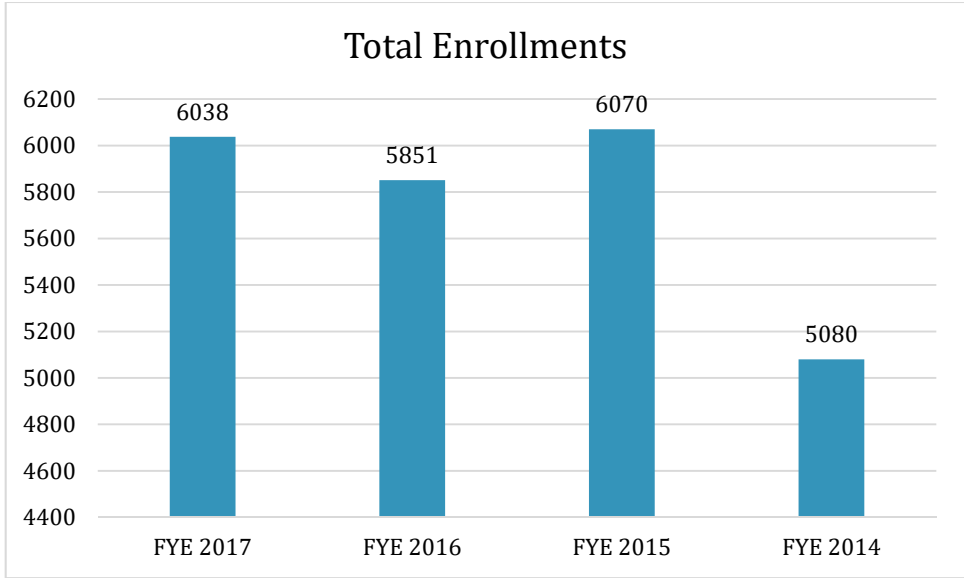
NALA offers a variety of education primarily through its delivery of live and on-demand webinars and self-study courses. NALA’s Conference & Expo provides paralegals from across the country with quality education and exceptional networking in an in-person format.





- Enrollments only – does not include completion or determination if course was taken for CLE or advanced specialty certification purposes.





NALA's Board of Directors



President
Cassandra Oliver,
ACP



Vice President
Jill I. Francisco,
ACP



Secretary
Melissa J.
Hamilton, ACP



Treasurer
Debra L.
Overstreet, ACP



Advanced
Paralegal
Certification
Board
Dawnne L.
Linenbrink, ACP



Certifying Board
Chair
Cathy Hulsey,
ACP



Continuing
Education Council
Chair
Jeanne M. Elliott,
ACP



Professional
Development
Committee Chair
Andrea Schultz,
ACP



Affiliated
Associations
Director
Jane McKinnon,
CP



Area 1 Director
Jaye L. Koch, ACP



Area 1 Director
Debby Sawyer,
ACP



Area 2 Director
Elizabeth H.
Nellis, ACP



Area 2 Director
Melissa M.
Klimpel, ACP



Area 3 Director
Annette R.
Brown, ACP



Area 3 Director
Michele T.
Pfeiffer, ACP



Executive
Director
Greta Zeimetz,
CAE

Board of Directors'

NALA's Board of Directors is responsible for the governance of the association.

Highlights:

- Evaluated Bylaws to determine proposed wording for electronic voting in the future
 - Reviewed Affiliate Associations program
 - Reviewed and revised NALA's Policy Manual
 - Represented NALA at tradeshow and affiliated association meetings:
 - Alabama Association of Paralegals
 - American Association of Paralegal Education
 - Arizona Paralegal Association
 - Arkansas Paralegal Alliance, Inc.
 - Heartland Paralegal Association
 - California Alliance of Paralegal Associations
 - California State University Los Angeles
 - Central Florida Paralegal Association
 - Greater New York Paralegal Association
 - Gulf Coast Paralegal Association
 - Inland Counties Association of Paralegals
 - International Practice Management Association
 - Iowa Legal Assistant Association
 - J.L. Turner Legal Association
 - Kansas Association of Legal Assistants
 - Las Vegas Valley Paralegal Association
 - Legal Assistants/Paralegals of Southern West Virginia
 - Nebraska Paralegal Association
 - North Carolina Paralegal Association
 - Northern Virginia Community College
 - Oklahoma Bar Association
 - Oklahoma Paralegal Association
 - Orange County Paralegal Association
 - Paralegal Association of Florida
 - Paralegal Association of New Jersey
 - Paralegal Association of Santa Clara
 - Roanoke Valley Paralegal Association
 - St. Louis Paralegal Association
 - Sierra Nevada Association of Paralegals
 - Southeastern Association of Legal Assistants
 - South Carolina Upstate Paralegal Association
 - Tennessee Paralegal Association
 - Texas Advanced Paralegal Seminar
 - Texas Panhandle Paralegal Association
 - Virginia Alliance of Paralegal Association
 - Virginia Trial Lawyers Association
 - Western Kentucky Paralegals
-

NALA's Certifying Board

The Certifying Board is responsible for the administrative rules and regulations of the CP program. They ensure that exam rules and regulations are carried out in compliance with the law and generally accepted certification testing practices, and in a way that ensures the financial stability of the program. These rules and regulations must be consistent with the goals and philosophies of NALA.

Highlights:

- Over 1300 examinees participated in the Certified Paralegal examination program since last July's report.
- The annual report for the Certified Paralegal program was filed with NCCA on May 31 in compliance with accreditation requirements.
- The board conducted its 2016 Job Task Analysis Survey. As a result of the survey, effective with 2018 administrations, the Certified Paralegal examination will be administered in a new format. The complete details were announced in March 2017.
- The board continues to increase accessibility for examinees by offering 50+ non-PSI testing locations, in addition to the 250+ testing centers through the PSI testing center network. The number of non-PSI locations increases each year as interest increases in serving as a testing center.
- The board continues to review and refine examination items with the assistance of PSI Psychometric Consulting Services.

CERTIFYING BOARD MEMBERS

Cathy Hulsey, ACP,
(Chair)

Bradley J. Beehler, Esq.

Stacey Bowers, J.D.,
M.L.I.S., Ph.D.

Kimberly Brown, ACP

Cathy Davis, ACP

Donna W. Gilliland, ACP

Nanci L. Lilja, ACP

Christine K. Lilo, ACP

Elizabeth Mann, J.D.

Kathleen H. Miller, ACP,
CAS

Eric D. Olson, J.D.

Tom Pokladowski

Karen L. Tumpower, ACP

Richard Zapala

Deidra A. Kirtley

Jaye L. Koch, ACP (Past
Chair) Ex Officio

Greta Zeimetz, CAE
Ex Officio

Marie Greninger
Ex Officio

Advanced Paralegal Certification (APC) Board

The APC Board is responsible for the administrative rules and regulations of the advanced certification program. The APC Board ensures that the rules and regulations are carried out in compliance with the law and generally accepted certification testing practices in a way that ensures the financial stability of the program. These rules and regulations must be consistent with the goals and philosophies of NALA.

Highlights:

- Revised and approved policies related to the APC Board.
- Conducting a major overhaul of APC courses to update them and make them more engaging.

APC BOARD MEMBERS

Dawnne Linenbrink,
ACP (Chair)

Janie Boswell, ACP
(Past Chair)

Catherine R. Durgin,
ACP

Dorothe (Theodora)
Schuch, ACP

Belinda Ann Thomas,
ACP

Edward L. Armstrong,
Esq.

Dr. Ron Goldfarb

Kelly A. LaGrave, ACP

Elisse Stern, ACP

Deana Waters, ACP

Cassandra Oliver, ACP

Greta Zeimetz, CAE

Committee Reports

NALA relies on its volunteer base to provide exceptional products to the paralegal industry. To learn more about NALA's committees or its members, please view our website.

CONTINUING EDUCATION COUNCIL (CEC)

The CEC is responsible for selecting NALA's educational offerings, along with determining the content for NALA's publication, *Facts & Findings*.

Highlights:

- Published 4 issues of *Facts & Findings* (Mar/April, May/June, Sept/Oct, and Nov/Dec) and 2 issues of *Facts & Findings Digital* (Jan/Feb and Jul/Aug) with a new proofreader and marketing team. Improved visual quality of the magazine and had timely production for all issues. We continued the Profiles column and produced the magazine without themes, overall response to the 'cleaner' look was very good. We will keep the clean look with less information on the cover, and add general topics to guide each issue internally.
- Finalized education for the 2016 conference in Las Vegas, NV and we chose speakers and topics for 2017 conference in Orlando, FL using the results of a member survey. Current 'hot topics' were discussed at the April CEC meeting to determine the direction for the 2018 conference education.
- Focused on quality webinar-presenters making the decision to keep, and ask for a return, only speakers with above average ratings based upon member responses.
- In the process of creating new CP review exams to support paralegals working toward certification.

CEC MEMBERS

Jeanne Elliot, ACP
(Chair)

June Brown, CP

Kristine Custodio, ACP

Julie Daniels, ACP

Kai Ellis, ACP

Amy Johnson

Nancy Jordahl, ACP,
FRP, (Past Chair/Board
Liaison)

Vicki Kasper, ACP

Heidi Mares, ACP

Cheryl Nodarse, ACP

Cassandra Oliver, ACP
(NALA President)

Greta Zeimetz, CAE
(NALA Executive
Director)

PROFESSIONAL DEVELOPMENT COUNCIL (PDC)

The PDC is responsible for reviewing the NALA Model Standards and Guidelines for Utilization of Paralegals, and the NALA Code of Ethics and Professional Responsibility. In addition, this committee provides professional development content for *Facts & Findings*.

Highlights:

- Comprehensive review and revisions to the organizational leadership development offerings
- Updated information for the Career Center tab of www.nala.org
- Review of the:
 - ✓ NALA Canons and Code of Ethics
 - ✓ Model Standards and Guidelines for the Utilization of Paralegals
 - ✓ Professional Development Committee Policy
 - ✓ Responses, in excess of 1200, to the National Utilization and Compensation Survey

PDC MEMBERS

Andrea Schultz, CP
(Chair)

Janet Betancourt, ACP

Carla Dennis, ACP
(Ethics Chair)

Kimberly Grabbe, ACP

Melanie Hicks, CP

Jeanie Johnson, CP

Nancy Jordahl, ACP
(Board Liaison)

Jillian Sherman, ACP
(Past Chair)

Dana Welcker, ACP

Cassandra Oliver, ACP
(NALA President)

Greta Zeimetz, CAE
(NALA Executive
Director)

Company Information



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Facebook: NALA.Paralegals

LinkedIn: NALA – The Paralegal Association

NALA HEADQUARTERS STAFF

Greta Zeimetz, CAE

Executive Director

Jennifer Riddle

Member Services Representative

Marie Greninger

Dir. of Administrative Services & Certification

Staci Shannon

Member Services Representative

Melody Brewer

Certification Coordinator

Mariah Williams

Education Coordinator

Lea Clark

Accountant

Vanessa Williamson

Member Services Representative

Stephanie Johnson

Member Services Representative

Paula VanStraten

Executive Assistant & Project Manager

JessicaLynn Nazarian

Marketing Associate