



State Bar of New Mexico  
Paralegal Division

Board of Directors  
Meeting Minutes

July 8, 2023

**I. Call to Order**

Chair, Linda Sanders, called to order the SBNM Paralegal Division Board of Directors Meeting at 11:30 am on July 8, 2023. The meeting was held in person at the NM State Bar Center and via Zoom.

**II. Attendees**

Board of Directors: Linda Sanders, Chair  
Meryl Barbere-Sutton, Chair Elect  
Debbie Tope, Past Chair  
Madeline Lovato, Secretary  
Kay Homan, Treasurer  
Michelle Jaramillo, Director  
Nicole Madrid, Director  
Katelynn (Kieran) Raney, Director

Directors not Present: Elizabeth Michelle Pettit, was not present and Kay Homan was her proxy.

Nicole Madrid was present via Zoom, but left meeting early  
Daniel Berg was not present, and Madeline Lovato was his proxy.  
Vanessa Martinez was not present.

Members: Ruby Silva  
Nettie Condit  
Yolanda Hernandez

### III. Approval of Minutes from last meeting

The April 1, 2023, Board of Directors Meeting minutes were approved as amended.

**Miscellaneous discussion:** Send flowers to Christina from the Division. Linda and Madeline will be teaching at CNM part time.

### IV. Officer Reports

See agenda and attached reports for full reports submitted by Board of Directors and Committees. If no particular items are noted, the reports were provided as follows:

#### a. Chair Report

i. The report provided speaks for itself. There were no questions and no further discussion surrounding the report.

#### b. Treasurer Report

- i. Total report shows \$63,399.63. This does not include the State Bar fees. There was a question as to dues, which Kay indicates have not been deposited yet. This number will go up again with the renewal period. Membership dues shows at 100%. The budget is fluid and the budget is currently low. There are seven pending checks for CLE approvals.
- ii. Will go over the estimate and budget for next year, Linda will talk about numbers with Meryl. If the budget is too high, we will have a deficit.
- iii. Only to 27% of budget in expenses to date. The majority of the budget will increase from here moving forward for the year. The donation to annual meeting is on here? Kay states that anything listed here has cleared. It won't be placed on the budget until she sees it on the bank statement.
- iv. Request the name to Division Development and Career Development Committee change on budget per Linda.
- v. Initial dues waiver money is under membership, not out of scholarship, it is a wash.
- vi. State Bar Admin/IT/Technology-has only billed once this year. The bill will be coming.

**ACTION ITEM:** What IT are we being charged for? Michelle works on webpage, part of member services, no charge to her. For the pages being on there? Debbie indicates that we would not have a problem paying Celeste for her time.

- vii. \$75.00 MCLE Course approval fee, would have to send them a check. Everyone gets charged for the course and it gets paid to the state bar, not the foundation who tracks compliance. Believe we should pay the foundation. They are completely

separate, and they worked hard to separate the two. The foundation is paying the money owed back. In a year or two the foundation will have paid back the State Bar fully.

- c. Past Chair Report
  - i. No report.

## **V. Standing Committee Reports**

- d. Bylaws Report
  - i. Issues with standing rules that need to be addressed, per Linda. Under Section 1 membership, Number 2, talks about disqualification for membership, Item C conflicts with what is said in the introduction. "If convicted felon can be considered with rehabilitation."

ACTION ITEM: Needs to be deleted or changed to read the same as the introduction.

ACTION ITEM: Function and responsibilities, section b, 3 \_\_\_\_\_, 3a need to update the URL. SBNM.org. This is not what is currently stated in the standing rules.

- e. CLE Coordination Sub-Committee Report
  - i. Discussion-Lunch and learns strong attendance. Scheduled a July Lunch and Learn. Usually don't when we have a full CLE for the month. The calendar is set before the BBC calendar and thought we would have an annual meeting in August. Going to move what is currently July to August. Don't know who is teaching it yet. It is scheduled for a wellness lunch and learn. Trying to find YouTube videos wellness related. May also have a speaker for the CLE.
  - ii. Daniel Berg's CLE was on Jury Selection and Jury Instructions. Pointed out the general pitfalls in putting them together properly. Thought is was good and informative. Comments in jotforms 3-4 enjoyed the casual approach. Linda is too formal when giving lectures.

ACTION ITEM: Send email about moving the July Lunch and Learn to August.

- f. CLE Providers Approval Committee Report
  - i. Discussion-We have seven seminars. This would put us 84% and with seven that will put us at 86%. It was the NALA Course, Blue Moon, that did not seek approval. Don't recall who the attorneys who taught from Family Law. No other questions for CLE Providers. Topics are being covered and the diversity that is there in CLE courses. How many division members are attending these CLE's? Don't know until

they turn in their compliance for the year. We have fees that are not done through the State Bar and they are paying us the money for the particular CLE. Any member of the division can go to a State Bar approved CLE.

ACTION ITEM: Meryl and Yolanda may have presenter information. They will look for that information.

g. CLE Tracking Report

- i. Headache in new audit process for compliance and tracking. In October we will be doing a Lunch and Learn on new process.

ACTION ITEM: Shannon and Linda will heavily advertise this Lunch and Learn.

h. Web Page Committee-

- i. When sending out invites for volunteers for events. Received emails and we were questioning, who are these people, Meryl? This is to volunteer for the Paralegal Division for the Pro Bono event not just open to anyone. We have fixed this. Spoke with Laura about using our Jotform and not their form to track volunteers for our division. Dana and Taylor spoke before the last veteran's event as we need to track and we are asking our members.
- ii. Linda would like to commend Meryl, as she has done well with working with Michelle to keep things timely, updated in terms of the calendar. They are posting Lunch and Learn videos and have great cooperation in getting this done.
- iii. Michelle delayed job bank postings to either take down or redate them. Question as to whether there should be a separate person than web monitor dealing with that part of the web page. Since March we have only had two job postings. One posting just renewed, and only have one posting right now. After the annual meeting we will be inundated with postings. Will announce that if you are looking for help we do have a job board.
- iv. August will be busy. Meryl will have to get with you about August, got through 700 emails, but will have a pro bono month coming up and lots of events. First La La Palooza coming up on Friday and trying to get everything together. There will be three or four different events. Will be sponsored by 2nd Judicial and Cesar Chavez from 10 am -4 pm, will break in two sessions, family law morning and civil law afternoon. After last event had 320 clients. Don't know what is going to happen for the next event as things have changed. Had less attendance for the last real ID fair. People are skeptical to show up since Covid still exists.

ACTION ITEM: We will require masks and do intake for clients outside. Working with pro bono coordinator about event and will get it to Michelle and Celeste who will get it up quickly.

- i. Newsletter Report
  - i. Discussion-Who is going to be attending the annual meeting? Would someone be willing to write an article about the annual meeting and our activities there? Think about it and get with Linda or Michelle.
  - ii. Suggestions for newsletter-Committee/Member spotlight and suggestion as to who. We have done Meryl, Daniel and Christina already. What is another committee spotlight that we can do next? One of the two ad hocs, that is what Debbie was thinking. Yolanda's committee would be good. Yolanda was agreeable to that. Linda and Michelle will give you the questions and if willing to write up yourself that is fine. Questions would be good for Yolanda.
  
- j. Membership Committee Report
  - i. Grandfather law, had a few inquire about this. We sent the updated rules and haven't heard back from any of those that inquired. Two attorneys inquired about their paralegals and provided information about requirements. Far more males in eastern part of the country than there are here. Some are asking for clarification of the definition of a paralegal versus membership. The definition speaks for itself, and the membership is part of a professional organization. We have academic requirements. Experience is not the only factor in being a paralegal.
  - ii. Attorneys why are you hiring people who don't have an academic background? You are hiring someone you have to train. It also depends on the specific area of law and how they do things in their firm. Paralegals should have a fundamental understanding of the job. Attorneys are paying less for someone without an education. It's the profession as a whole, we have to get message across to hire people who have the academic background. There is a girl on Meryl's floor who she spoke to and the girl said she can't wait to do legalization stuff. Meryl had to bite her tongue. Attorneys are hiring people who are not academically competent. At the annual meeting CLE we will ask the attorneys about this and ask them what their hourly rate is.
  - iii. Legal assistants or legal secretaries are the ones who don't have the experience or education. Nicole states that when she was working at Patterson for 12 years, had a degree and certification from NALA, and two girls were hired from the coffee shop and one from another law firm who never received an education but worked for many years. Both seem to be doing very well. We need to get people to do the certification through NALA and CLEs, as some function and do the work well without an education to. Where is the middle point? Online programs are less expensive. The other point is that state employees and where you work may be based on tenure. Your title is changed based on tenure. The employee has no control

over this. You top out at where you are at in a state job and can't move up further (Michelle and Nicole). Will go as high as state will let me in my area.

- iv. Attorneys don't really have a choice in rural areas. Eastern and Portales have a certification, but not a degree. All industries are having trouble hiring right now, and people choosing to do other things, being in rural areas, find it harder now than before. From a court perspective, yes, we are down two court managers and a judicial specialist. The hiring pool is not what we would like it to be. We train people and then they leave. Does a judicial specialist require an education or experience? One or the other. Linda asks, "in your area, how much fluctuation do you see with military spouses?" They do hire some military spouses. They don't apply for state jobs, but for private attorneys who do hire military spouses, they train them and then they leave. So there is some turn over.
- V. Need to have a conversation with potential members, as education is not the only avenue to membership. You need to have X number of years of experience, and then take the test. They can study and take the test. It shouldn't be that hard. It can be more difficult for those who have knowledge and experience who work for the District Court and specific areas. Some Paralegals only know federal law, probate and uniform trust code, and just don't know the other areas. That's why we have study materials available.

k. Pro Bono Committee report

- i. The report speaks for itself. We had two events in the quarter. The event should be Wills for Heroes, and Not ask a lawyer. We did a Facebook post. Meryl will be going to the event. It's on the 27th and we can let people know where we are on sign ups. We need to reach out to Las Cruces and area members. Devaney and others are down there. Damon and Laura have the schedule set up a week before. We need six Paralegals, basically we need two groups. We are expecting at least twenty heroes. We could carpool. Linda can fit six people in her vehicle.

ACTION ITEM: Will send out another email on Monday and check where we are in Wednesday. We will update event information and get it to Michelle.

- ii. Yolanda filled in at veteran's event. It was nice a nice turnout. The Attorneys did end up needing a notary. For the events we suggest you take your notary stamp and book just in case. We can't do an event at the symposium, as YLD is doing an event down in Roswell. We need to brainstorm about what we can do. We have a committee meeting Monday with 1<sup>st</sup> Judicial.

ACTION ITEM: Reach out to Nicole about doing wills for heroes in her district.

1. Scholarship Report

- i. Table and send back to committee. I want to clarify what you are discussing. For example, the individual must be currently registered as full time student at \_\_\_\_ with \_\_\_\_\_. That is not what is in Yolanda's report. They changed part of the flyer. It says for college or an existing college student. This is not what we offer. Want clarification as to who is eligible for the scholarship. Then it says it is for a high school student entering college or looking to enter the profession. This scholarship is not a part of Yolanda's committee but should be introduced under scholarship. Nettie states it needs to be specific under the qualifications. It states they need to be enrolled in one paralegal course; this should be double.
- ii. Yolanda is working with the scholarship committee to final. We have not gotten to my report, but we are working with Scholarship committee. Linda states it is inappropriate to be discussed in Yolanda's report and should be in the scholarship committee report and not the ad hoc committee report. One, in terms of budgeting, it becomes very difficult to know who is in charge of what. They are interrelated. Two, in terms of the reporting, and both are requesting budget increases, but neither tell how the money will be spent. \$200 is the initial fee waiver, it is not a budgeted item and needs to be taken out of there as it is a wash.

ACTION ITEM: Will ask Devaney to rework the budget with a clear proposal.

- iii. There are all kinds of deadlines for the scholarship proposal. How do you envision this, as it indicates it only applies to spring semester and how will it apply to the fall semester? Nettie will look for previous information on scholarships. Nettie gave the committee the whole binder and will get her some more information. Meryl needs clarification for what you need to qualify. Funding for out of state scholarship. Also, the scholarships they are awarded going into college may not cover certain things. May need to indicate what it is covering for these students who apply for the scholarship. We can email Devaney with questions and concerns about the scholarship details and Linda would also be helpful for the committee as they are jointly working on this.
- m. New Mexico Well-Being Committee Report
- i. Christina has a lot going on. She held a two-day training for Paralegals. She is really getting our name out there. Linda is going to ask Christina for newsletter content. It will be an article about well-being weekend and the law. We need to educate our membership; this is a priority and what it entailed to the division and members about their own wellbeing. Last year there was a whole room. We are expanding upon that this year. We need to go into that room at the annual meeting. Last year it took Linda a while to find room, and it was across from our vendor table. Please

take time to go into that room. Meryl is a retired massage therapist, and she got half of her credits at UNM Law School. The students would tip them. How much do you tip? This is all done through State Bar and wellness committee. Are they volunteering or is State Bar paying them? If there is a tip jar then I would tip the massage therapist.

- n. Ad Hoc Paralegal education Promotion Committee
  - i. The committee has new members. Saw that Holly joined a second committee. Yolanda welcomes Holly Davis and Andrea who joined the committee and will be in contact for upcoming career days. Yolanda states that the first part of report speaks for itself.
  - ii. The scholarship will take time to fully develop. It came up and we wanted to create a scholarship to give to high school students. Linda indicates that this is not the appropriate way to bring it in the report. We started to work with scholarship committee and are having some meetings. We are seeking board approval for the scholarship and want to the T's to be crossed and I's dotted. When doing high school days, we are educating students on our division and promoting accredited schools. We have the high school students sign up for scholarship and/or information. Right now we are not going to dissect the scholarship. This is what our committee wants to use the scholarship for. Why is the scholarship just being offered to high school students? The scholarship is not here to promote existing paralegals. The purpose of the scholarship is for high school students. We will continue to meet to refine scholarship details. We are trying to get the scholarship information to the students when school year begins again. Yolanda-Hope working with committee to have three scholarships available before end of year.

ACTION ITEM: Linda needs the committee to work with the scholarship committee to break it down further. The committee will ask for questions, email those to Linda. The committee will respond to the questions. To Linda or Devaney and involvement of other committees that is up to her. Let's not cloud the purpose of the committees. We need to fine tune this. Need to look at this further before we vote on it.

- iii. We are also looking at a shadowing program for students which will be forthcoming. We want to get people educated, but maybe not only high school, maybe CNM. We could reach out to other colleges as well. When we attend career fairs there are many different professions attending. We will continue our ongoing activities and work to promote job shadowing for interest in the program. Discussion-How do we get a list to have job shadowing available to the students?
- iv. The committee is also asking for a budget increase. Some of the items that were expended with the budget include, the purchase of candy and the containers, which



can be used for the annual meeting. Just need the containers back for the career fairs. We did not utilize all of the flash drives and camera blockers, which can also be used for the annual meeting. Waters can also be available. Per Linda the table is full and will pass on the waters. What does the committee need \$1,500.00 for as proposed with the request to increase the budget? We want to create a big banner that would be more suitable for the career fairs. Looking at the banner, we want to display our logo and additional information. The table we use is not very big, and when we have a line of students rushing through each table, thought it would be easier to get information across to them on the banner. Our current balance is \$785.71. Division Development is \$1,000.00. Linda advises that the committee needs to get bids for banner. The budget amount noted was before I split the costs between the two ad hoc committees. If there is a specific item that needs to be presented for approval, get the information together first in order to advise what it will cost. Second, and this applies to both committees, we guessed at a budget because they are both new in determining what they should be allotted. I think that rather than increasing the budget we should leave them as they are, with the knowledge that they may go over budget so next year and years going forward may have a more realistic number. The budget is made to be fluid, budget, this is the first-year spending money do a better job tracking and what their needs really are. Get with Vap signs. Go through State Bar and work with entities to get discounts and reach out to Addie Sanchez at State Bar. Can talk about it at the Budget discussion. Going over budget as long as what it is used for is what we intended to use it for (Debbie). Trust committees that their using money for what it is for. Devaney report, everyone has access to the Jot Form. Remember that. Committee continues to seek people to join committee. Do we have to have a form with regard to having children at work? Before move forward, contact Stormi Ralstin.

ACTION ITEM: Scholarship will be tabled, continue to work with committee.

- o. Ad Hoc Division Development Committee Board Report
  - i. Swag has been purchased. There were issues with the order, but they have all been resolved. Kay hasn't gotten a bill yet. Ordered the notebook, 3 in one charger and charging stick. Had to increase the minimum to 75 not 50, had State Bar logo, not our logo. This will allow members attending to take notes. It is not to give away to attorneys. One of the other items also came with the State Bar logo and not our logo.
  - ii. Talked about annual meeting and our presence. Will offer recognition to two legal entities, not just law firms, that has the most division members and recognize them at the annual meeting. The two entities are Carrillo law firm and Presbyterian. Carrillo Law Firm is losing one of their employees who is retiring. Meryl and Linda are working on what the award will look like. It will go to one of the Paralegal

members to take back to their employer to display it. The idea is friends of the Paralegal Division under the term will be an ongoing recognition.

- iii. Discussion-Want to expand on the insert or publishers of the Bar Bulletin that print proclamations with respect to recognition of Paralegals. It would be in the form of “ Hey did you know?” Linda is working to get this completed with Celeste.

- o. Election Committee-No report.

Break for Lunch 12:51.

Reconvene 1:25 pm

## **VI. Old Business**

- a. Linda discussed the division swag and what was ordered as provided in the packet.
- b. Annual meeting-we are on track for the one hour break out session.
  - i. Also discussed what our presence will look like for the division table and ideas. Will have a poster board, display board that has photos from the holiday dinner, and various pictures of members participating in events. In addition there will be membership applications, flyers, and swag displayed. There will be a recognition board for law firms that we are highlighting at the annual meeting that will be on display. Where and what? When will be announced, at our luncheon. Have awards on display at the table for the course of event for a talking point for those that stop by. Those awards will be distributed to a member from each firm afterward.
  - ii. Our luncheon is limited to division members. Linda will send out luncheon sign up again. We need to also send out volunteer sheet during the annual meeting for the vendor table to cover the table. Last year that failed and we need a better process. Linda is open to suggestions. It should not fall on Kathy to do the volunteering for the table for the entire event. Christina did a lot last year as well. It is good to have two people at the table. Think about it and get back to Linda to let her know how you can help. For the price we paid, we are getting it all.

**ACTION ITEM:** Send out volunteer sheet for vendor table at annual meeting.

- iii. Yolanda asked-Do you have to register for the whole meeting to attend 1 hour break out session? Linda-Those of you that attend the luncheon and want to stay for the CLE can, and we will get you in the room. I will

have sign in sheet and you will get the credit. Anyone who wants to come from the division may attend. I am the moderator for the panel, asking questions and keeping things on track. At the CLE I will ask division members to stand to be recognized. This is on Friday afternoon.

- c. Other happenings at the annual meeting-They are having a Wellness room and puppies. YLD is doing trivia night on Friday, which starts at 5:30 pm. I don't know the format, individual or team, but would like participation from our division to have a team present. Last year they upgraded my room as being a part of the BBC. I was supposed to have a small suite but got put in the VIP suite. Wednesday-Saturday happy hour and hors d'oeuvres.

## **VII. New Business**

- a. Linda: Chris Becker for the BBC sent an email on Thursday. They are doing a fundraiser for the State Bar Foundation. They have 50 baskets for \$50 each. They currently only have 18 baskets secured. As a division would we like to donate to put together one or two baskets. \$50 per basket, they will go do that. Linda moves that the division contribute \$500 from the budget line item for the purchase of ten baskets. Debbie seconds the Motion. Approved. Kay will send check request off to Angela. Donation for fundraising baskets and line items to that. Linda will let Chris know the check is coming. Debbie asked if they put on the basket that our division sponsored it. Linda states she believes last year she saw that the sponsor was named on each basket.
- b. Linda is very pleased with advertising this year. Celeste hasn't approached us about our actual division ad. Linda will follow up with her.

## **I. Adjournment**

Motion made to adjourn. Linda Moves, Meryl seconds, Motion passes. Meeting adjourned at 1:53 pm.

Minutes submitted by: Madeline Lovato, 2023 secretary.