



ANNUAL MEETING
AT THE STATE BAR OF NEW MEXICO
SATURDAY, JANUARY 4, 2020

AGENDA

Meeting called to order at: _____

I) Approval of the Minutes from January 5, 2019: Minutes Unavailable

II) Officer Reports

Chair	Lynette Rocheleau	Report Attached
Chair-Elect	Yolanda Hernandez	Report Attached
Immediate Past Chair	Christina Babcock	Report Attached
Secretary	Kay Homan	
Treasurer	Angela Minefee	Report Attached

III) Standing Committee Reports

Ad-Hoc	Emmalee Attencio	Report Attached
Budget & Finance	Angela Minefee	Report Attached
Bylaws	Kay Homan	Report Attached
ENews/Web Page	Debbie Tope & Amy Meilander	Report Attached
CLE-Coordination	Yolanda Hernandez & Linda Sanders	Report Attached
CLE-Provider Approvals	Angela Minefee	Report Attached
CLE-Tracking	Kay Homan	Report Attached
Nominating & Elections	Ruby Silva	Report Attached
Events	Barbara Lucero	Report Attached
Membership	Kathy Campbell & Yolanda Hernandez	Report Attached
Pro Bono/Community Service	Amy Melander & Linda Sanders	Report Attached
Professional Development	Emmalee Attencio & Ruby Silva	Report Attached
Scholarship	Nettie Condit	Report Attached
LLLT Working Group	Emmalee Attencio	Report Attached

IV) Old Business

A)

V) New Business

A)

VI) Adjournment at _____

**PARALEGAL DIVISION
ANNUAL MEETING
January 4, 2020**

CHAIR REPORT

CHAIR Lynette Rocheleau

DATE OF REPORT January 4, 2020

PARALEGAL DIVISION ACTIVITIES:

- Started duties as Chair on January 4
- Answered emails from member and potential members with questions
 - Forwarded emails to appropriate committees
 - Welcome emails to new members
 - Discussed concerns with PD members
 - Upcoming CLE and Volunteer Opportunity
 - Survey to members
- Prepare for meetings
 - Send out reminders
 - Create Agendas
- Approve members to the Facebook site (with Emmalee)
- Met with Angela regarding newsletter
- Annual Meeting
 - Met with Past Chair regarding State Bar Annual Meeting
 - Attended the Annual Meeting
 - Attended the Paralegal Division meet and greet at the Annual Meeting
 - Attended the Paralegal Luncheon at the Annual Meeting
 - Hosted the Paralegal Day Luncheon at Pappadeaux
- Attend December CLE
 - Hosted Annual Holiday Dinner at Nick & Jimmys
- Prepare for January Meeting
 - Create notebooks for new Board members

BOARD OF BAR COMMISSIONERS ACTIVITIES:

- Attended BBC new member orientation
- Attended BBC meetings
 - Prepare for upcoming meetings
 - Served on and attended Awards Committee Meeting
 - attend regular meeting

- Attended Albuquerque Association Law Day luncheon
- Prepare for and attend the 2019 State Bar of New Mexico Annual Meeting at Hotel Albuquerque in Old Town
 - Attended Past President's dinner
- Attend BBC Retreat in Taos
- Attend December meeting, swearing-in ceremony, and reception in Santa Fe

Thank you for allowing me to serve as the 2019 Chair of the Paralegal Division. I appreciate all of the help and support of the Division, especially the Board.

**PARALEGAL DIVISION
ANNUAL MEETING
JANUARY 4, 2020**

CHAIR-ELECT ANNUAL REPORT

CHAIR-ELECT: Yolanda Hernandez
DATE OF ORAL REPORT: January 4, 2020
ACTIVITIES UNDERTAKEN:

I attended the following Division events 2019:

- **Board Meetings:** January 5; March 16; May 18; September 2, 2019
- **Law Day CLE:** April 27, 2019
- **State Bar's Annual Meeting:** Paralegal Division's "Meet and Greet" and Annual Meeting Luncheon at Hotel Albuquerque & Hotel Chaco, Albuquerque, NM
- **Paralegal Day:** August 24, 2019 - Pappadeaux Seafood Kitchen
- **The Institute CLE:** December 13, 2019

As chair-elect, I assisted with the following Division CLE events:

- (1) **Law Day CLE:** "Emerging Ethical Issues in the Practice of Law": The webcast by David was recorded on a DVD and available via YouTube.
- (2) **Half-Day CLE:** "Litigation Skills": The program was canceled due to low member registrants and volunteers for the event.
- (3) **December Institute CLE:** "Cornucopia of Law: Practical Applications for Paralegals and Lawyers."

Continue Legal Education: "CLE Success Starts Here! CLE Planning Information Session."

On March 22, 2019, I attended the New Mexico State Bar Foundation's webinar orientation titled "CLE Success Starts Here! CLE Planning Information Session." This orientation was designed to assist CLE liaisons, section/division/committee chairs, or anyone interested in developing and implementing CLE annual institutes and other CLE programs. The topics discussed included program planning, design and development best practices, budget and fiscal responsibilities.

Legal Community:

Communications regarding inquiry of criteria for membership.

Volunteer: Wills for Heroes and Real ID

I communicated with the BBC regarding my consent to serve as the Paralegal Division Liaison to the BBC for a one-year term through December 31, 2020. I look forward to serve our members as Chair in 2020.

ISSUES REQUIRING BOARD ACTION: None.

**PARALEGAL DIVISION
ANNUAL BOARD MEETING
JANUARY 4, 2020**

IMMEDIATE PAST CHAIR REPORT

IMMEDIATE PAST CHAIR: Christina Babcock

DATE OF REPORT: January 4, 2020

ACTIVITIES UNDERTAKEN IN 2019:

- Met with Lynette Rocheleau on April 28, 2019 to discuss the upcoming State Bar Annual Meeting. We discussed the division's annual donation amount and the paralegal luncheon.
- Attended the 2019 State Bar Annual Meeting at Hotel Albuquerque in Old Town.
- I presented a CLE on Attorneys working with Paralegals at the conference.
- Attended the Paralegal Division meet and greet at the Annual Meeting.
- Attended the Paralegal Luncheon at the Annual Meeting.
- Attended the Paralegal Day Luncheon at Pappadeaux.
- Notified CNM faculty and students about the State Bar Paralegal Division Scholarship.
- Spoke with Lynette about notebooks for new Board Members and Officers.
- Emailed information needed to complete the notebooks.

I enjoyed my time as chair-elect, chair, and immediate past chair of the division.

**Paralegal Division
Budget & Finance Committee
Treasurer's Report
Board Meeting Report**

Committee Title: Budget & Finance Committee

Committee Chair: Angela Minefee

Date of Report: January 4, 2020

RE: Treasurer's Report

Over the course of 2019, I have reviewed the Chart of Accounts compared to the State Bar's accounting categories and have identified a few inconsistencies. I have taken steps to revise accounting categories to be in-line with budget trends and use. The Treasurer now has the ability to make deposits into our checking account.

In addition, I have implemented a free accounting software for better historical accounting and budgeting. We are now using Wave Accounting. It is a free, online accounting program. The account is connected to a treasurer email accounting for the purpose of using the software only. I am still working a lingering issue with a account transaction, but overall, the program helps to track income and expenses easily and accurately, and speeds the time necessary to produce reports.

Respectfully submitted,

Angela Minefee
Treasurer

State Bar of New Mexico, Paralegal Division

2019 Proposed Budget, Approved on September 8, 2018

	Starting Balance	Ending Balance
1000 Checking 403-8	\$57,022.69	\$53,533.32

Income	Budget	Actual	% to Budget
4500 CLE Provider Approvals	\$ 1,500.00	\$ 5,625.00	375%
4100 CLE Seminars	\$ 1,000.00	\$ 1,040.00	104%
4300 Earned Interest	\$ 100.00	\$ 103.05	103%
4000 Membership Dues	\$ 9,000.00	\$ 11,126.75	124%
Total Income	\$ 11,600.00	\$ 17,894.80	154%

Expenses	Budget	Actual	% to Budget
6741 CLE Expenses	\$ 7,500.00	\$ 2,035.75	27%
5250 Contract Labor	\$ 4,850.00	\$ 4,850.44	100%
6110 State Bar Administrative Fees	\$ 1,000.00	\$ -	0%
6140 Donations/Contributions	\$ 6,000.00	\$ 5,500.00	92%
6310 Mileage/Travel Reimbursements	\$ 250.00	\$ 69.48	28%
6995 Miscellaneous Expenses	\$ 150.00	\$ 37.70	25%
6210 Postage	\$ 100.00	\$ -	0%
6230 Office Supplies	\$ 150.00	\$ -	0%
6230 Gifts for Members	\$ 5,000.00	\$ 4,139.45	83%
6210 Printing and Reproduction	\$ 150.00	\$ 319.74	213%
6160 Receptions & Meetings	\$ 5,000.00	\$ 3,931.61	79%
6751 Scholarships	\$ 1,000.00	\$ 500.00	50%
Total Expenses	\$ 31,150.00	\$ 21,384.17	69%

PARALEGAL DIVISION

JANUARY 4, 2020 ANNUAL/BOARD MEETING

COMMITTEE TITLE: AD-HOC 25th ANNIVERSARY COMMITTEE

COMMITTEE CHAIR: EMMALEE ATENCIO

COMMITTEE MEMBER: N/A

DATE OF MEETING: JANUARY 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Committee formed during September 21 PD Board Meeting with Emmalee Atencio and Yolanda Hernandez as co-chairs with no additional members
- October 9, 2019 Yolanda Hernandez withdrew from the committee
- Initial research conducted into commemorative gifts for members

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION
BYLAWS COMMITTEE REPORT
FOR 2019 ANNUAL MEETING
AND JANUARY 4, 2020 BOARD MEETING**

COMMITTEE CHAIR: Kay L. Homan, CP

COMMITTEE MEMBERS: Nettie Condit, Ruby Silva

DATE OF MEETING: January 4, 2020

ACTIVITIES UNDERTAKEN: Revision of the Standing Rules

ONGOING ACTIVITIES:

The Committee, with the assistance Board members and committee chairs of the Division, who have provided valuable comments and suggestions, is continuing the revisions of the Standing Rules. The Committee expects to have the final version of the revised Standing Rules ready to present to the Board for approval early in 2020, at least by the March meeting.

Some recommended changes include: (1) clarification of duties of officers to conform to current practices; (2) clarification and simplification of duties of committees (including adding "Social Media" as a subcommittee of the Communications Committee); (3) clarification of election guidelines, (4) eliminating or conforming conflicting rules and (5) eliminating attachment of forms as they are fluid and are posted on the website. However, the Canons will be attached as an Appendix.

ISSUES REQUIRING ACTION: None

ATTACHEMENTS:

PARALEGAL DIVISION

ANNUAL REPORT

COMMITTEE TITLE: Web Page/ENews Committee

COMMITTEE CO-CHAIRS: Deborah R. Tope, CP, RP; Amy Meilander

DATE OF ANNUAL REPORT: January 4, 2020

The web page for the Paralegal Division is part of the web site for the State Bar of New Mexico at www.nmbar.org. To find the Division's web page, click on "About Us" and follow the Division links or click on the link below:

http://www.nmbar.org/Nmstatebar/About_Us/Paralegal_Division/Paralegal_Division.aspx?WebsiteKey=687d8cd9-4ff9-4f83-a12f-6657211dab17&hkey=7fea2437-2fa2-4acd-bef2-6d8e1d012f43&New_ContentCollectionOrganizerCommon=1#New_ContentCollectionOrganizerCommon.

The Paralegal Division's home page has information about the Division and its history along with a number of links to the membership qualifications, MCLE requirements, the Rules Governing Paralegal Services, the Code of Ethics and Professional Responsibility, Bylaws and Standing Rules. We also offer information for use by our members on the web page. Those materials include: the Paralegal Division News section where we welcome new Division members and post the yearly schedule of Division activities; our free job bank; schedules for CLEs sponsored by the Paralegal Division; the member directory; the CLE credits table; a list of the Division's Officers and Board of Directors; a list of committees and the chairs of those committees; minutes & reports from prior Division annual and board meetings; pro bono opportunities and frequently used forms. Information about the Division's Scholarship program is posted in the fall when that committee begins to accept applications for any scholarships to be given.

Our most used feature is the CLE credits table. On that page, click the link labeled CLE credits table. The CLE credits are listed in numeric order by bar number so members can easily check what credits have been recorded for them. The Division maintains carryover credit for members from the prior year in a separate table located on the same tab and members should also check the carryover credit table for credits applicable to the current year. The Division encourages members to submit their credits on an ongoing basis as they are earned throughout the year to help the CLE tracking committee avoid the end-of-the-year crunch when members prepare to submit their renewal applications. The CLE credits table is updated periodically so please submit your credits regularly and monitor your progress on the web page.

The tabbed pages across the menu bar are the materials that are most often changed such as the calendar of events, member directory & CLE credits table. Materials that are more static, such as the bylaws, standing rules, MCLE requirements and more are accessible through links located on the home (or About) page. In 2017, the web page committee resumed posting minutes and reports from the Division's Annual Meeting and Board meetings on the separate tab called Minutes of PD Board Meetings.

In March of 2018, a tab listing ongoing pro bono opportunities for paralegals was added to the web page. Amy Meilander will provide more information on this new feature in her Annual Meeting report for the Pro Bono & Community Service committee.

During the membership renewal period, starting in mid-November, a link is added to the Division's home page with the renewal form. The deadline for submitting membership renewals this year is January 15, 2020. When the renewal period is over, the link to the renewal form is removed from the home page to avoid confusion among forms.

On the main State Bar of New Mexico's web site at www.nmbar.org members can access all the same features available to attorney members of the Bar, such as the electronic version of the weekly Bar Bulletin and the classified ads, as well as schedules for CLEs sponsored by the Bar. Under the CLE link, Division members can register and pay for those CLEs on-line through the web site's shopping cart feature. To log-in enter your **Bar number** as the username and your password which is case sensitive. Initially you will need to create an account and then you will be able to register for CLEs on-line. Feel free to browse the full web site for all its features.

Paralegal Division members are included in the Bar's master electronic distribution list and receive the Bar Bulletin via e-mail on a weekly basis. Additionally, Division members will receive the weekly ENews via the Bar's master distribution list. The ENews includes news of interest to attorney and Paralegal Division members of the Bar. The Division submits news items and reminders for its members for inclusion in the ENews so watch for Division-related items in those weekly e-mails from the Bar. Members who do not wish to receive the Bar Bulletin or ENews may opt out by following the instructions at the bottom of the e-mails forwarding either the Bar Bulletin or the ENews.

Members can contact the Division by regular postal mail sent in care of the State Bar of New Mexico at P.O. Box 92860, ABQ, NM 87199-2860 or by sending an e-mail to pd@nmbar.org. Inquiries will be directed to the appropriate person for a response. Communicating by e-mail is a cost-effective method of keeping our members informed so please ensure that we have your current e-mail address. You can send inquiries, questions and address changes, including any e-mail address changes, to the Division by e-mail to pd@nmbar.org.

In early 2019, the Division created 4 additional e-mail addresses to facilitate inquiries related to membership, CLE credits, the job bank and pro bono opportunities and posted a "Contact the Division" listing on our home page. General inquiries may still be sent to pd@nmbar.org.

In the first half of 2019, the Division circulated a short survey to the members seeking feedback on issues related to membership. 83 members responded to the survey. The Board of Directors has reviewed the responses and is working to develop programs and activities to accommodate the suggestions and interests of the members.

In response to suggestions received through the membership survey, in early August, Kathy Campbell, the Division's Administrative Assistant, revised the CLE carryover credit table to reflect total credits available for members for renewal at the end of December, 2019. The updated 2019 CLE credits table along with the new CLE Totals table was posted and updated throughout the remainder of the year. The text on the web page was revised accordingly.

The schedule of events for 2020 will be posted on the web page following the Annual Meeting on January 4th. Updates to the Officers & Directors and committee chairs will be made shortly after the Annual Meeting. Information on any CLE programs scheduled will be posted as they become available.

We welcome any suggestions to make the web page as useful to members as possible. Please send any suggestions regarding the web page to the Division e-mail address.

Deborah Tope
Amy Meilander
Web Page/ENews Committee

**PARALEGAL DIVISION
ANNUAL MEETING
JANUARY 4, 2020**

COMMITTEE TITLE: CLE COORDINATION SUBCOMMITTEE

COMMITTEE MEMBERS: Linda Sanders, Yolanda Hernandez

DATE OF REPORT: January 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

The Committee coordinated the CLE's for April, September and December 2019.

April CLE:

The Committee presented the Law Day CLE titled: "Emerging Ethical Issues in the practice of Law" on April 27, 2019 at State Bar of New Mexico. Twenty-two (22) Division members registered for the event and six (6) members attended via the live webcast.

September CLE:

In preparing for this CLE, the Committee incorporated feedback from the Paralegal member survey, requesting more events presented by paralegals specifically for the benefit of paralegals, in planning the September CLE. The topic for the CLE was "Litigation Skills" which was decided and based on the Paralegal member survey feedback. Multiple emails were sent to the Division members to volunteer to present starting in July 2019. The event was advertised on the Division website and a "Save the Date" was emailed to the Division members in July. Due to a lack of volunteers to present and lack of registrants, the September CLE was cancelled. We extend our appreciation to the two Division members, Emmalee Atencio and Sue Gorman, who volunteered to present: Emmalee for 1 hour and Sue for ½ hour. As of September 21, 2019, three members had registered for the event.

December CLE:

The Division, as co-sponsor with the State Bar of New Mexico, held The Institute CLE on December 13, 2019. The topic for the CLE was, "Cornucopia of Law: Practical Applications for Paralegals and Lawyers". The final attendance numbers by the Paralegal members and others are not yet available. As of the date of the CLE, the registration was thirty-nine (39) in-person and roughly forty (40) via the live webcast. The Committee wants to recognize and thank Angela Minafee for her work in securing speakers and putting together this successful event.

ONGOING ACTIVITIES:

The Board Rooms, Modrall Classroom and Auditorium at the State Bar have been reserved for the upcoming 2020-2021 CLE events. The December 4, 2020 auditorium reservation includes the Keleher and Rodey classrooms.

ISSUES REQUIRING BOARD ACTION: None at the present.

ATTACHMENTS: Agendas for the CLEs are available upon request.

**Paralegal Division
CLE Provider(s) Approval Committee
Board Meeting Report**

Committee Title: CLE Provider(s) Approvals Committee

Committee Chair: Angela Minefee

Date of Report: January 4, 2020

RE: Committee Activities

This year, the Paralegal Division has approved 101 CLEs for credit to New Mexico paralegals. The Division has approved and will collect \$7,575 in CLE Provider Approval Fees this year. Last year, the Division approved 97 CLEs and collect \$6,975 in total. This year we saw an overall increase in income of 8.6% or \$600. This amount is consistent with predictions in both Quarter 2 and Quarter 3. The Institute for Paralegal Education submitted the overwhelming majority of courses for approval, only two courses were submitted by Half Moon Education.

Please see the attached spreadsheet for the course topics and dates presented.

Date	Course #	Credits	Seminar Title
04/09/19	82304	1 General, 0 Ethics	The Real Estate Paralegal's Guide to Due Diligence
04/15/19	82305	1 General, 0 Ethics	Corporate Governance: What Paralegals Need to Know
04/26/19	82306	0 General, 1 Ethics	The Paralegal's Guide for Ethical Use of Social Media
05/02/19	82610	1 General, 0 Ethics	Case Law Research for Paralegals
05/06/19	unknown	3 General, 1 Ethics	Legal Research for Paralegals
05/07/19	unknown	3 General, 1 Ethics	Legal Writing for Paralegals
05/09/19	82619	5 General, 1 Ethics	Advanced Medical Records for Paralegals
05/10/19	82620	1 General, 0 Ethics	Case Management for Paralegals: Managing Documents, File, Calendars, and Tasks
05/14/19	82621	3 General, 0 Ethics	A Paralegal's Guide to Deadlines & Calendaring
05/15/19	82622	6 General, 0 Ethics	Auto Injury Litigation Boot Camp for Paralegals
05/21/19	82611	3 General, 0 Ethics	Document Discovery and Review in Discovery: What Paralegals Need to Know
05/22/19	82612	5 General, 1 Ethics	A Paralegal's Guide to Discovery in Divorce
05/23/19	82623	0 General, 1 Ethics	Ethics and Legal Practice: The Paralegal's Role
06/05/19	82613	1 General, 0 Ethics	The Paralegal's Guide to Medicare Set-Asides and Conditional Payments in Injury Settlements
06/06/19	82614	5 General, 1 Ethics	Trust and Estate Administration for Paralegals
06/11/19	82615	3 General, 1 Ethics	Social Media, Smartphone, and Email Evidence: Mistake Paralegals Should Avoid
06/14/19	82616	1 General, 0 Ethics	A Paralegal's Guide to Tax Exempt Organizations: Planning and Formation
06/19/19	82624	6 General, 0 Ethics	A Paralegal's Guide to Pleadings, Motions, Discovery Requests, and Briefs
06/20/19	82617	0 General, 2 Ethics	Unauthorized Practice of Law, Confidentiality and More: Ethical Guidelines for Paralegals
06/24/19	82618	1 General, 0 Ethics	Complex Social Security Law Issues: The Paralegal's Guide
06/26/19	81884	6 General, 0 Ethics	Trial Preparation from Start to Finish for Paralegals
06/26/19	82625	5 General, 1 Ethics	The Paralegal's Guide to Law Office Management
07/10/19	83146	1 General, 0 Ethics	Federal Court: What Paralegals Need to Know
07/11/19	83147	5 General, 1 Ethics	Top Mistakes in Estate Administration Accounting and Distribution: A Paralegal's Guide
07/17/19	83152	1 General, 0 Ethics	Collecting Judgments and Discovering Assets for Paralegals
07/18/19	83144	5 General, 1 Ethics	Advanced Family Law for Paralegals
07/24/19	83153	5 General, 1 Ethics	Litigation for Paralegals: Top Challenges to Overcome
07/25/19	83154	3 General, 0 Ethics	Medical Record Analysis for Paralegals: Chronologies, Summaries and Expense Itemizations
07/30/19	83155	1 General, 0 Ethics	The New Tax Law for Paralegals: LLCs, C-Corps, S-Corps, Partnerships and More
07/31/19	83148	0 General, 2 Ethics	Paralegal Ethics: Avoiding Administrative Error
08/05/19	83149	5 General, 1 Ethics	Discovery Response and Document Production: A Paralegal's Ultimate Guide
08/06/19	83150	3 General, 0 Ethics	Social Security Disability Evidence: A Paralegal's Guide
08/13/19	83145	5 General, 1 Ethics	Getting and Staying Organized: Creating "Best Practices" for Paralegals
08/15/19	83156	1 General, 0 Ethics	The Paralegal's Guide to Personal Injury Damages
08/21/19	83157	5 General, 1 Ethics	Business Contracts: A Paralegal's Ultimate Guide
08/22/19	83158	1 General, 0 Ethics	The Paralegal's Guide to Construction Contracts
08/28/19	83159	3 General, 0 Ethics	Preparing for Trial: What Paralegals Need to Know
08/29/19	83151	1 General, 0 Ethics	Legal Writing for Paralegals: Common Mistakes to Avoid
09/10/19	83617	5 General, 1 Ethics	Advanced Real Estate for Paralegals
09/12/19	83629	3 General, 0 Ethics	A Paralegal's Guide to Corporate Governance
09/13/19	83618	1 General, 0 Ethics	The Paralegal's Guide to Adobe Acrobat
09/17/19	83619	1 General, 0 Ethics	Top 6 Trial Mistakes Paralegals Make
09/18/19	83620	5 General, 1 Ethics	Employment Law: What Paralegals Need to Know
09/19/19	83621	5 General, 1 Ethics	Case Management 101 for Family Law Paralegals
09/24/19	83622	1 General, 0 Ethics	Bankruptcy Rules and Forms 101 for Paralegals
09/25/19	83623	0 General, 2 Ethics	How Paralegals Handle the Everyday Ethics of Email
09/26/19	83615	5 General, 1 Ethics	Auto Injury Claims From Start to Finish for Paralegals
10/03/19	83616	5 General, 1 Ethics	Investigative Techniques for Paralegals
10/09/19	83624	1 General, 0 Ethics	Title Law for Paralegals
10/10/19	83630	3 General, 0 Ethics	The Paralegal's Guide to Organizing Discovery Documents
10/16/19	83625	6 General, 0 Ethics	Handling the Divorce Case From Start to Finish: A Paralegal's Guide
10/17/19	83626	0 General, 1 Ethics	Ethical Implications of Technology: A Paralegal's Guide
10/21/19	83627	3 General, 0 Ethics	What Paralegals Need to Know About Wills and Trusts
10/23/19	83631	5 General, 1 Ethics	Litigation Boot Camp for Paralegals
10/29/19	83628	2.5 General, 0 Ethics	Top Skills Paralegals Need to Know: MS Word, Excel and More
10/30/19	83632	1 General, 0 Ethics	HIPAA Compliance for Paralegals: Obtaining and Maintaining Records
11/05/19	84386	3 General, 0 Ethics	Discovery in Divorce For Paralegals
11/06/19	84383	5 General, 1 Ethics	Medicare and Medicaid Liens for Paralegals: Navigating the Portal and Other Requirements
11/07/19	84393	1 General, 0 Ethics	Accounting Software Tips for Paralegals: QuickBooks and Beyond
11/12/19	84394	1 General, 0 Ethics	Organizing SSDI Claims: Top Tips for Paralegals
11/13/19	84389	5 General, 1 Ethics	Paperless Office 101 for Paralegals
11/14/19	84387	3 General, 0 Ethics	Real Estate Boot Camp for Paralegals
11/18/19	84384	1 General, 0 Ethics	Effective Calendaring, Docketing, and File Ticking System Tips for Paralegals: Maximizing the Use of Microsoft Outlook
11/20/19	84399	5 General, 1 Ethics	Medical Records: Top Paralegal Pitfalls and Challenges
11/21/19	84398	0 General, 2 Ethics	Dealing With Difficult Clients: Ethical Considerations for Paralegals
12/04/19	84395	1 General, 0 Ethics	Investigation and Discovery of Auto Injury Claims: The Paralegal's Role
12/05/19	84390	5 General, 1 Ethics	Paralegal's Guide to Family Law
12/10/19	84397	3 General, 0 Ethics	Document Retention and Data Security: What Paralegals Need to Know
12/11/19	84400	5 General, 1 Ethics	Gathering Electronic Evidence: An Advanced Guide for Paralegals
12/12/19	84388	3 General, 0 Ethics	What Paralegals Need to Know About Business Contracts
12/17/19	84391	5 General, 1 Ethics	Trial Notebooks and Exhibits: A Paralegal's Ultimate Guide

12/18/19	84392	5 General, 1 Ethics	Estate Administration Accounting and Distribution for Paralegals
12/19/19	84385	1 General, 0 Ethics	The Paralegal's Guide to Locating Persons and Finding Background Information
12/20/19	84396	1 General, 0 Ethics	Drafting Demand Letters and Damage Calculations for the Personal Injury Paralegal
01/03/20	84926	1 General, 0 Ethics	ESI Preservation and Spoliation Challenges for Paralegals
01/07/20	84929	3 General, 0 Ethics	Land Surveys and Legal Descriptions for Paralegals
01/08/20	84935	5 General, 1 Ethics	Financial Issues in Divorce for Paralegals
01/15/20	84931	5 General, 1 Ethics	Paralegal's Guide to Liens and Subrogation in Personal Injury
01/22/20	84932	6 General, 0 Ethics	Trusts 101 for Paralegals
01/23/20	84933	5 General, 1 Ethics	A Paralegal's Guide to Researching and Investigating
01/28/20	84930	3 General, 0 Ethics	The Paralegal's Guide to Auto Injury Litigation
01/30/20	84936	3 General, 0 Ethics	The Paralegal's Guide to Workers' Compensation Cases
02/04/20	84937	1 General, 0 Ethics	Case Law Research for Paralegals
02/05/20	84945	5 General, 1 Ethics	Trial Preparation From Start to Finish for Paralegals
02/06/20	84942	3 General, 0 Ethics	Top Probate Administration Challenges for Paralegals
02/11/20	84940	3 General, 0 Ethics	Drafting and Reviewing Real Estate Transaction Documents: A Paralegal's Guide
02/14/20	84938	1 General, 0 Ethics	Top 11 Federal Court Mistakes Paralegals Make (And How to Avoid Them)
02/18/20	84944	5 General, 1 Ethics	Top Challenges for Family Law Paralegals
02/20/20	84941	3 General, 0 Ethics	Discovery Requests: A Step-by-Step Guide for Paralegals
02/26/20	84946	5 General, 1 Ethics	Medical Records Made Easy for Paralegals
02/27/20	84939	0 General, 1 Ethics	Overcoming the Top Ethical Dilemmas Paralegal's Face
03/04/20	85203	6 General, 0 Ethics	Social Security Disability from Start to Finish for Paralegals
03/06/20	85218	1 General, 0 Ethics	Top Case Management Strategies for the Personal Injury Paralegal
03/11/20	85201	5 General, 1 Ethics	A Paralegal's Guide to Discovery in Divorce
03/12/20	85213	3 General, 0 Ethics	The Paralegal's Guide to Subpoenas
03/17/20	85232	3 General, 0 Ethics	Business Law for Today's Paralegal
03/18/20	85209	5 General, 1 Ethics	Legal Research and Writing: Tips, Tricks and Handy Know-Hows for Paralegals
03/25/20	85208	0 General, 2 Ethics	Paralegal Ethics: Handling Uncomfortable Situations
03/31/20	85210	5 General, 1 Ethics	Auto Injury Litigation: Top Paralegal Mistakes
04/09/20	85205	3 General, 0 Ethics	Surveys, Plats, Legal Descriptions and Title Insurance: A Paralegal's Guide
04/16/20	85233	5 General, 1 Ethics	Business Contracts: A Paralegal's Ultimate Guide

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION
CLE TRACKING COMMITTEE REPORT
FOR 2019 ANNUAL MEETING AND JANUARY 4, 2020 BOARD MEETING**

COMMITTEE CHAIR: Kay L. Homan, CP

COMMITTEE MEMBERS: Kathy Campbell, Division Administrator

DATE OF MEETING: January 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

The CLE credits are reported as they are reported to the CLE Tracking Chair on a monthly basis. Issues regarding CLE reporting include members not sending requests to PD-CLE email, but to the Division email which requires forwarding to the Committee. Further, a number of members fail to include their bar numbers when submitting requests for CLE approval.

ONGOING ACTIVITIES:

Continuing to report CLE as it is reported.

ISSUES REQUIRING BOARD ACTION: Continue to communicate the proper way to submit CLE requests for approval.

ATTACHMENTS: None

COMMENTS:

PARALEGAL DIVISION

COMMITTEE TITLE:	ELECTION COMMITTEE ANNUAL REPORT
COMMITTEE CHAIR:	RUBY SILVA
COMMITTEE MEMBER:	NETTIE CONDIT
DATE OF MEETING:	JANUARY 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

The Committee sent out the Declaration of Candidacy Forms in September with an October 15, 2019 deadline to respond. No one turned in a Declaration by the deadline, so with the Board's approval, the deadline was extended to November 15, 2019.

The Election started on November 27, 2019 and ended on December 16, 2019. Due to unforeseen circumstances, the Declaration from Nancy Torres was missed by the Election Committee and her name was left off the ballot. Debbie Tope had agreed to run for Director so all the Director positions would be filled. Once Nancy Torres notified the Committee that her name was left off the ballot, the Committee informed the Board. Debbie Tope then informed the Board and the Committee that she wanted her name removed from the ballot. The Committee removed Debbie Tope's name from the ballot and added Nancy Torres' name to the ballot.

ISSUES REQUIRING BOARD ACTION:

None.

ATTACHMENTS:

Certification of 2020 Elections

COMMENTS:

None

**STATE BAR OF NEW MEXICO
PARALEGAL DIVISION
NOMINATING AND ELECTIONS COMMITTEE
CERTIFICATION OF 2020 ELECTION**

I, Ruby Silva, as Chair of the Nominating and Elections Committee of the Paralegal Division, do hereby certify the following results for the 2020 Elections.

POSITION	CANDIDATE	NO. OF VOTES
Chair-Elect	Angela Minefee	72
Secretary	Brandi Nastacio	72
Treasurer	Kay L. Homan CP	71
Board Member	Emmalee Atencio	65
Board Member	Dawne B. Roberto	61
Board Member	Nancy Torres	41
Board Member	Deborah R. Tope, CP, RP	28

I further certify that there were 72 ballots received by the deadline for voting.

Signed this 30th day of December 2019

Ruby Silva

Ruby Silva, Chair
Nominating and Elections Committee

**PARALEGAL DIVISION
Board of Directors Annual Meeting
January 4, 2020**

EVENTS COMMITTEE REPORT

COMMITTEE CHAIR: Barbara C. Lucero, CP

COMMITTEE MEMBER: None

DATE OF REPORT: December 30, 2019

Below is the annual report for the Events Committee.

The committee organized the following events during the 2019 calendar year:

- Refreshments and lunch at the State Bar of New Mexico ("SBNM") at our regular and annual meetings on January 5th.
- Lunch at the SBNM at our regular called board meeting at the SBNM March 16th.
- Refreshments and lunch at our regular called board meeting at the SBNM on June 22nd.
- Happy hour food refreshments at the SBNM Annual Conference on the patio of Garduño's Restaurant at Hotel Albuquerque on August 1st.
- Lunch at Pappadeaux Seafood Kitchen in Albuquerque to celebrate Paralegal Day on August 24th.
- Refreshments and lunch at our regular called board meeting at the SBNM on September 21st.
- Dinner at Nick & Jimmy's Restaurant in Albuquerque to celebrate the holidays with our Division members on December 13th.

The committee is also organizing the refreshments and lunch for our regular and annual meetings at the SBNM on January 4, 2020.

Please let me know if you have questions.

Thank you.

PARALEGAL DIVISION
ANNUAL COMMITTEE REPORT

COMMITTEE TITLE: **Membership**

COMMITTEE: **Yolanda Hernandez and Kathy Campbell (Co-Chairs); Kay Homan**

DATE OF REPORT: **January 4, 2020**

2019 Membership Activity:

- We started 2019 with 145 active members and 12 inactives. We lost 23 actives to nonrenewal (21 to nonrenewal and 2 transferring to inactive status) leaving 122 active members after the 2019 renewal cycle.
- Three of 12 inactives did not renew.
- We approved 20 new members during the year.
- We ended the year with 142 active members and 11 inactives.

PARALEGAL DIVISION

COMMITTEE TITLE: Pro-Bono/ Community Service Committee Annual Report

COMMITTEE: Amy Meilander, Linda Sanders

DATE OF MEETING: January 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

The collaboration with various Pro bono event sponsors from the State Bar of New Mexico continues to be successful. The Committee had regular contact with the Young Lawyers Division (Allison Block-Chavez) and New Mexico Legal Aid (Meryl Sutton) who provided flyers and/or links to their web pages which contained information on the event itself and contact information for our members to volunteer.

The Web Page/ENews Committee updated the Pro Bono Opportunities web page as events were reported in a continued effort to keep Division members apprised of pro bono events around the state.

A monthly email was sent to paralegal division members about the next month's pro bono events. In the monthly email messages, division members were pointed to the web page and are urged to post the announcements (that are in English and Spanish) around their offices to advertise the events, even if they do not plan to attend. In an effort to promote events and participation outside the Albuquerque and Santa Fe areas, an event was high-lighted each month on both the web page and in the monthly email.

Any email questions from sponsors or Division members were answered and questions concerning CLE credits were sent to the CLE Tracking Committee.

October was Pro Bono month. There were 12 events held throughout the state, including Albuquerque, Santa Fe, Alamogordo, Roswell, Portales, Silver City, Taos, and Deming.

A final count of how many Division members attended pro bono events will not be available until the end of January. At that time, a report will be emailed to the Board and a special email thanking our 2019 volunteers will be sent to our members.

ONGOING ACTIVITIES:

The Committee will continue to keep in contact with sponsors, post new events, and continue the monthly pro bono opportunities email. The committee will also continue to reach out to other organizations for additional events.

ISSUES REQUIRING BOARD ACTION: None

PARALEGAL DIVISION

JANUARY 4, 2020 ANNUAL BOARD MEETING

COMMITTEE TITLE: PROFESSIONAL DEVELOPMENT

COMMITTEE CHAIR: EMMALEE ATENCIO, RUBY SILVA

COMMITTEE MEMBER: N/A

DATE OF MEETING: JANUARY 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- No committee members added this year
- Coordinated with Bylaws/Rules committee regarding revisions of standing rules
- Monitored progress of LLLT research in New Mexico
- Contact made with Las Cruces division members regarding hosting a 2020 Board Meeting in Las Cruces. Susan Baker of Miller Stratvert volunteered a conference room in her office for the May 16, 2020 Board Meeting

PARALEGAL DIVISION

COMMITTEE TITLE: Scholarship Committee Annual Report

COMMITTEE CO-CHAIRS: NETTIE CONDIT

COMMITTEE MEMBERS: Ruby Silva, Angelique Wall, Kay Homan,
Carolyn Winton

DATE OF MEETING: January 4, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

2020 Flyer was sent to CNM and Santa Fe Community College.

Two applications were received (both from CNM) and reviewed. Two \$250 scholarships were awarded this year to the excellent applicants.

ONGOING ACTIVITIES: None

ISSUES REQUIRING BOARD ACTION: None at the present.

ATTACHMENTS: None

COMMENTS: None

PARALEGAL DIVISION

JANUARY 4, 2020 ANNUAL MEETING

COMMITTEE TITLE: **LLLT WORKING GROUP, PD LIAISON**

LIAISON: **EMMALEE ATENCIO**

DATE OF MEETING: **JANUARY 4, 2020**

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

Attended LLLT Work group meetings in Albuquerque on January 9, March 4, April 19, August 16, and November 15. The workgroup was initially divided into three sub-committees, Education, Rules, and Practice Areas, focused on the various details that would be needed to implement LLLTs in New Mexico. During a meeting on May 16 an Order from the Supreme Court was distributed which broadened the Working Group's focus beyond LLLTs and the previous sub-committees were disbanded and two new sub-committees, Buffet Options and Problem Areas, were formed with the revised focus on determining what issues require being addressed in New Mexico and reviewing multiple avenues of potentially addressing those issues. A draft report was submitted to the Working Group in October and the draft was discussed at length at the November 15 meeting. Ultimately, the Working Group will be recommending several initiative to the Supreme Court but will recommending that the LLLT initiative undergo further research before any move toward implementation.