



**BOARD MEETING**  
VIA VIDEO CONFERENCE  
SATURDAY, JANUARY 9, 2021

**AGENDA**

Meeting called to order at: \_\_\_\_\_

- |  |                               |                     |
|--|-------------------------------|---------------------|
| <b>I. Officer Reports</b>                          |                               |                     |
| Chair  | Angela Minefee                | No Report           |
| Chair-Elect  | Emmalee Atencio               | No Report           |
| Immediate Past Chair                               | Yolando Hernandez             | No Report           |
| Secretary  | Linda Sanders                 | No Report           |
| Treasurer  | Kay Homan                     | No Report           |
| <b>II. Standing Committee Reports</b>              |                               |                     |
| Budget & Finance                                   | Kay Homan                     | Report Attached     |
| Bylaws & Standing Rules                            | Kay Homan                     | Report Attached     |
| eNews/Web Page                                     | Debbie Tope & Amy Meilander   | Report Attached     |
| CLE Coordination                                   | Linda Sanders                 | Report Attached     |
| CLE Provider Approvals                             | Kay Homan                     | Report Attached     |
| CLE Tracking                                       | Emmalee Atencio               | Report Attached     |
| Nominating & Elections                             | Ruby Silva                    | No Report           |
| Events Coordination                                | Dawne Roberto                 | No Report           |
| Membership   | Kathy Campbell                | Report Attached     |
| Pro Bono/Community Service                         | Linda Sanders & Amy Meilander | Report Attached     |
| Professional Development                           | Emmalee Atencio & Ruby Silva  | No Report           |
| Scholarship  | Nettie Condit                 | Report Attached     |
| Social Media Sub-Committee                         | Emmalee Atencio               | Report Attached     |
| <b>III. Approval of September 19, 2020 Minutes</b> |                               | <b>(5 minutes)</b>  |
| <b>IV. Committee Reports</b>                       |                               | <b>(10 minutes)</b> |
| <b>V. Old Business</b>                             |                               |                     |
| a. <b>Scholarship Committee</b>                    |                               | <b>(15 minutes)</b> |
| <b>VI. New Business</b>                            |                               |                     |
| a. <b>Committee Appointments</b>                   |                               | <b>(5 minutes)</b>  |
| b. <b>Board &amp; Committee Communication</b>      |                               | <b>(10 minutes)</b> |
| c. <b>Brown Bag CLEs</b>                           |                               | <b>(15 minutes)</b> |
| <b>VII. Adjournment</b> _____                      |                               |                     |

**Paralegal Division  
Budget & Finance Committee  
Treasurer/Budget & Finance Committee  
Board Meeting Report**

**Committee Title:**                    **Budget & Finance Committee**

**Committee Chair:**                **Kay L. Homan, CP**

**Date of Report:**                  **January 9, 2021**

**RE:**

Budget vs. Actual as of 12/31/20 is attached. Commemorative Gifts totaled \$3,177.83; Member Benefits totaled \$1,975.00; Receptions & Meetings totaled \$3,798.57 (included \$15 gift cards for members). Postage for mailings of gifts to members increased to \$686.05. Only \$500.00 of the \$6,000.00 budgets for Donations/Contributions was expended. There were no applicants for scholarships, so the \$1,000.00 scholarship budget was not expended. We have a balance of \$54,776.59 in the checking account as of December 31, 2020.

Respectfully submitted,

Kay L. Homan, CP  
Treasurer

## State Bar of New Mexico, Paralegal Division

### 2020 Budget vs. Actual

	Starting Balance	Ending Balance
1000 Checking 403-8	\$53,496.96	\$54,776.59

Income	Budget	Actual	% to Budget
4805 CLE Provider Approvals	\$ 6,000.00	\$ 8,550.00	143%
4500 CLE Seminars	\$ 1,000.00	\$ 420.00	42%
4300 Earned Interest	\$ 100.00	\$ 77.71	78%
4000 Membership Dues	\$ 9,000.00	\$ 9,880.00	110%
<b>Total Income</b>	<b>\$ 16,100.00</b>	<b>\$ 18,927.71</b>	<b>118%</b>

Expenses	Budget	Actual	% to Budget
6741 CLE Expenses	\$ 1,000.00	\$ 1,092.49	109%
5250 Contract Labor	\$ 5,200.00	\$ 5,175.00	100%
6110 State Bar Administrative Fees	\$ 1,500.00	\$ 1,067.57	71%
6140 Donations/Contributions	\$ 6,000.00	\$ 500.00	8%
6310 Mileage/Travel Reimbursements	\$ 500.00	\$ 56.11	11%
6995 Miscellaneous Expenses	\$ 200.00	\$ -	0%
6210 Postage	\$ 100.00	\$ 686.05	686%
6230 Office Supplies	\$ 150.00	\$ 46.34	31%
6230 Commemorative Gifts	\$ 3,000.00	\$ 3,177.83	106%
6230 Member Benefits	\$ 4,000.00	\$ 1,975.00	49%
6210 Printing and Reproduction	\$ 150.00	\$ 99.79	67%
6160 Receptions & Meetings	\$ 6,000.00	\$ 3,798.57	63%
6751 Scholarships	\$ 1,000.00	\$ -	0%
<b>Total Expenses</b>	<b>\$ 28,800.00</b>	<b>\$ 17,674.75</b>	<b>61%</b>

Member gift cards in lieu of CLE Expenses includes gift Postage increased for mailing	anniversary lunch cards for presenters commemorative	credited to 6160  gifts
Received \$1,275 for 2021	membership dues	

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION  
BYLAWS COMMITTEE BOARD MEETING REPORT**

**COMMITTEE CHAIR:** Kay L. Homan, CP

**COMMITTEE MEMBERS:** Nettie Condit, Ruby Silva. Kathy Campbell

**DATE OF MEETING:** January 9, 2021

**ACTIVITIES UNDERTAKEN:**

**ONGOING ACTIVITIES:**

The revisions to the Standing Rules were approved by the Board on April 14, 2020. The Standing Rules have been finalized and posted on the Webpage. If the Board votes to eliminate the Scholarship Committee, we will revise the Standing Rules to eliminate this Standing Committee.

The Bylaws Committee is available to the Division Chair for assistance with any parliamentary procedures as needed pursuant to the provisions of the Standing Rules.

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** Web Page Committee/ENews Committee

**COMMITTEE CO-CHAIRS:** Deborah R. Tope, Amy Meilander

**DATE OF REPORT:** January 9, 2021

### **ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

Modifications to the division's web pages continue to be made to better assist Paralegal Division members find needed resources and announcements. A new "CLE Resources" page was created to make a "one-stop-shop" for PD members looking for information about CLEs. The CLE Resources page contains the CLE credits tables, links to the CLE submission form, CLE Forms - Sponsor Certification Form, Request for CLE Provider Approval; and CLE Programs sponsored by the Division. The "CLE Credits Table and Member Directory" page was renamed to "Member Directory" and populated with the memberships, active and inactive, as of December 2020. The committee plans to revise and expand the Member Directory page in 2021.

The CLE Credits Table and CLE Total Table were posted to CLE Resources page as they were updated.

Information for the December CLE and the January CLE were posted on the CLE Resources page and the News & Calendar page. The January CLE, Annual Meeting and board meeting, and the link to the JotForm to register were posted to the News & Calendar and CLE Resources pages.

The Scholarship flyer was posted on the home page.

The link for the 2021 membership renewal was also posted to the home page and will remain on the Division's home page until mid-February.

As board meetings and CLEs were changed to Zoom meetings, pages were updated directing members to registrations. The Calendar of Events was updated regularly to reflect the changes in board of directors meetings as needed due to the ongoing COVID-19 pandemic.

Job ads continued to be submitted and posted through December and the Job Bank page was updated accordingly. We hope this was helpful to PD members during this difficult employment period.

Board of Directors minutes were posted following board meetings.

New members were welcomed on the News & Calendar page and an email was sent to each new member with login information, committees to join, and links to the Paralegal Division web pages.

Election results were posted on the News & Calendar page. Once the new Officers and Directors take office at the Division's Board Meeting on January 9th, the committee will post those names for 2021, along with the calendar of events for 2021, and change any committee chairs.

The Pro Bono Opportunities page will be updated when events resume.

The committee continues communication with their IT State Bar Department contacts concerning the move to a new web server and new NM State Bar web site design. As of the date of this report, the PD web pages can and will continue to be updated until further notice.

**ISSUES REQUIRING BOARD ACTION: None**

**PARALEGAL DIVISION  
BOARD MEETING  
January 9, 2021**

**CLE COORDINATION SUB-COMMITTEE REPORT**

**COMMITTEE CHAIR:** Linda Sanders

**COMMITTEE MEMEBR:** Angela Minefee

**DATE OF REPORT:** January 9, 2021

**ACTIVITIES SINCE LAST REPORT:**

September 26, 2020: "Trial Preparation and Electronic Discovery" CLE was held via Zoom. The CLE offered 3 general hours of credit. The presenters for the event were Margaret "Peggy" Graham and Lalita Devarakonda. Advertisement was run in the Bar Bulletin, a flyer was posted on the Division website and an email blast sent to the membership. A total of 78 members attended the event.

December 4, 2020: "Hot Topics in the Legal Community" CLE was held in conjunction with the State Bar Center for Continuing Legal Education via. The CLE offered 4.8 hours of general credit and 1.5 hours of ethics credit. The presenters for the event were: Chirs Dodd, "You Can't Make This S\*\*\* Up: How to Avoid Sharing a Jail Cell With Your Client"; Dr. Rex Swanda, "Minimizing Cultural Errors in Professional Practice"; Lisa Millich and Kymberleigh Dougherty, "The Intersection of Family Law, Probate and Guardianships and Conservatorships"; Gabe Sanchez, "Survey and Focus Group Results from 2019 CDLP's Report on Status of Minorities in the New Mexico Bar and CWLP's 2019 Report"; the Honorable Wendy York (Ret.), "Mediation Do's and Don'ts"; and Tim Gardner, "Disability Rights in a Time of COVID-19". Advertisement was run in the Bar Bulletin, a flyer was posted on the Division website and an email blast sent to the membership. A total of 89 members attended the event.

**ISSUES REQUIRING BOAR ACTION:** None.

**ATTACHMENTS:** Agendas for the CLEs are available on request.

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

**Committee Title:** CLE Provider(s) Approvals Committee

**Committee Chair:** Kay L. Homan, CP

**Date of Report:** January 9, 2021

**RE:** First Report

NBI/IPE is the only provider currently submitting CLE for approval by the Division in 2020. We deposited \$8,550 in fees in 2020. \$6,000 is in the budget for CLE approvals. There are 8 approvals pending checks so far for 2021.

**PARALEGAL DIVISION**

**JANUARY 9, 2021 BOARD MEETING**

**COMMITTEE TITLE:** CLE TRACKING

**COMMITTEE CHAIR:** EMMALEE ATENCIO

**COMMITTEE MEMBER:** KAY HOMAN

**DATE OF MEETING:** JANUARY 9, 2021

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- Answered member questions regarding CLE credits and recorded member CLE credit submissions for inclusion and tracking by the AA in the division database and monthly posting on the website
- Sent an email to all members who were not yet in compliance for 2020 to allow them time to submit or complete their 2020 CLE requirements
- Made several Facebook posts regarding upcoming CLEs, submission reminders, and posted link to CLE Resources tab for members to access the online submission form and CLE Tables

## **PARALEGAL DIVISION**

### **COMMITTEE REPORT**

**COMMITTEE TITLE:**           **Membership**

**COMMITTEE MEMBERS:**   **Angela Minefee (outgoing); Emmalee Atencio (incoming); and Kathy Campbell (Co-Chairs); Kay Homan**

**DATE OF MEETING:**       **January 9, 2021**

#### **2021 Membership Renewal**

The 2021 membership renewal cycle is in full swing with an e-mail renewal notice to members sent on November 16. We currently have 129 active members and 11 inactives. Of those 129 active members, 126 will be required to renew by January 15 or be subject to disenrollment (three were approved after September 1 and do not need to renew). To date, 51 members have renewed. A reminder email will be sent the first week in January.

#### **Changes to UNM and CNM Paralegal Studies Programs**

It has come to the attention of the Committee that the UNM Continuing Education Paralegal Studies certificate program is no longer a post-baccalaureate program and, therefore, applicants who have completed that program under its new requirements (without other qualifications) would no longer qualify for membership under the S.Ct. Rules. Further, the Committee has been informed that CNM has sunsetted the post-certificate paralegal program due to lack of enrollment. It now only offers the AAS paralegal degree.

#### **2020-21 Bench and Bar Directory**

See full report in the 2021 Membership Committee Annual Report.

**PARALEGAL DIVISION  
BOARD MEETING  
January 9, 2021**

**COMMITTEE:**      **Pro-Bono/ Community Service Committee Report**

**COMMITTEE CHAIR:**    **Linda Sanders**

**DATE OF MEETING:**    **January 9, 2021**

**ONGOING ACTIVITIES:**

Unfortunately, due to the current health crisis, all events continue to be cancelled. The Chair of the Committee continues communication with sponsors of the various pro bono events to offer volunteer services for any online or telephonic events and to be prepared to support events and inform our membership when events resume.

**ISSUES REQUIRING BOARD ACTION:**      None.

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** Scholarship Committee Report

**COMMITTEE CHAIR:** NETTIE CONDIT

**COMMITTEE MEMBERS:** Carolyn Winton, Kay Homan, Ruby Silva

**DATE OF MEETING:** January 9, 2021

### **ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

The committee has discussed the items brought up at the Board Meeting on 9/19/20 and it is the consensus of the committee that we do not change the requirements for scholarships, except to remove the recommendation letter from an instructor.

The flyer was sent out to CNM, NMSUA and Clovis Community College with a deadline of 12/1/20. NO applications were received.

Other items brought up at the 9/19/20 meeting that the committee considered and noted:

- a. Discussion from the board meeting indicated that the transcripts and essay requirements should be discontinued. The transcript and essay are used to evaluate the qualifications of the applicants. We use the essay to show writing skills and thought processes. This is an important part of our jobs as paralegals.
- b. There was also a discussion about who is eligible to apply for a scholarship, it is the committee's recommendation that only New Mexico residents should be eligible unless the out of state resident is attending a New Mexico program.
- c. The flyer to high schools is a logistical nightmare. Different criteria would be needed for qualifications, and how many high school students really know what they want to do.
- d. Scholarships for MEMBERS to take certification exams could be investigated to see what would be needed to give a scholarship. NO scholarships for non-members. Perhaps this should be made into a separate scholarship from the academic scholarship.

A sheet attached to this report shows the previous winners and non-winners of scholarships. NONE of these people have joined the Division. The committee's understanding was the purpose of the scholarships was to encourage membership in the Division once they met all qualifications for membership.

The scholarship committee feels that the committee should be disbanded.

### **ONGOING ACTIVITIES:**

**ISSUES REQUIRING BOARD ACTION:** Status of the committee

**ATTACHMENTS:**

**Winner/non-winner table**

**COMMENTS:**

SCHOLARSHIP WINNERS  
NONE ARE MEMBERS OF THE DIVISION

2012	2013	2014	2015
Venus Emerson Noella Frost		Edward Miller Anita Jenkins Anna Hoefler	Chi-Hsin Chang Sharon Trotter
2016	2017	2018	
Malcolm Alonzo Diego Rascon Merissa Reddy	Ashley Gonzales Julia Garcia Julia Maciel Lucy Parra	Clarisse Cravens Julia Garcia Kelly Sloboda	
2019	2020		
	Melissa Frank Natalie Pino		

SCHOLARSHIOP NON-WINNERS  
NONE ARE MEMBERS OF THE DIVISION

2012	2013	
Katherine Coleman-Martinez	Angela D. Chavez Gabriel Roybal Kamila Janeway	
2014	2016	2017
Jessica Lucero Ramond Carabajal Shannon Gifford	Bonnie Barnaby Margie Rutledge Carol Renna Franke Wylde	Anialynda Hill
2018		
Tiffany Vigil-Montano Celese Kristina Jaramillo		

**PARALEGAL DIVISION**

**BOARD MEETING JANUARY 9, 2021**

**COMMITTEE TITLE:** SOCIAL MEDIA SUB-COMMITTEE

**COMMITTEE CO-CHAIRS:** EMMALEE ATENCIO  
YOLANDA HERNANDEZ (2020)  
ANGELA MINEFEE (2021)

**COMMITTEE MEMBER:** N/A

**DATE OF MEETING:** JANUARY 9, 2021

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- Facebook
  - Moderated activity in Facebook page
  - No new members added since last report
  - Maintained event calendar
  - Multiple posts made to encourage group activity
  - Angela Minefee sent Admin request on Jan. 2, 2021 as co-chair of subcommittee for 2021
- Twitter
  - Moderated activity, very low activity, only 3 members following
- Other
  - Reviewing possibility of other social media accounts for division including Instagram and LinkedIn

MINUTES AS APPROVED FROM  
PRIOR PD MEETING WITH REPORTS



# Meeting Minutes

September 19, 2020

## **I. Call to Order**

Chair, Yolanda Hernandez, called to order the regular meeting of the SBNM Paralegal Division Board of Directors at 11:06 a.m. on September 19, 2020. Meeting held via Zoom conference.

## **II. Attendees**

Board of Directors: Yolanda Hernandez, Chair  
Angela Minefee, Chair Elect  
Emmalee Atencio, Director  
Nettie Condit, Director  
Dawne Roberto, Director  
Linda Sanders, Director  
Debbie Tope, Director  
Nancy Torres, Director

Members: Kathy Campbell, Division Administrative Assistant  
Ruby Silva

Board of Directors not in attendance:  
Brandi Nastacio, Secretary (Yolanda Hernandez proxy vote)  
Lynette Rocheleau, Immediate Past Chair (Angela Minefee proxy)  
Kay Homan, Treasurer (Debbie Tope proxy)

## **III. Approval of minutes from last meeting**

The minutes from the April 18 meeting required extensive revision and will need to be approved upon submission to the Board. Additionally, amended minutes from January meeting need to be submitted to the Board for review and approval.

Revisions to April 18 minutes needed:

- Angela Minefee not listed as present
- Reports should not be listed and then left blank
- CLE Coordination: sentence not complete
- Standing Rules, not bylaws changed
- HAVOC should be Ad Hoc



- New business carried and passed

ACTION ITEM: Secretary to submit revised January and revised April minutes to board for approval no later than Saturday, October 3, 2020.

The minutes from the June 27 meeting were approved. (Linda Sanders motion, Angela Minefee second)

#### **IV. Reports**

See agenda and attached reports for full reports submitted by Board of Directors and Committees. Reports not listed in this section were not discussed further than submitted written report.

- a. Chair Elect Report
  - i. Discussion of Newsletter
    - 1. Linda Sanders to draft article on Ruth Bader Ginsburg
    - 2. Kathy Campbell to draft article on Division history
- b. Treasurer Report/Budget and Finance Committee
  - i. Discussion of line items to budget
    - 1. CLE Expenses includes gift cards for December 2019 CLE
    - 2. Contract Labor is salary to Division Administrative Assistant
- c. E-News/Webpage
  - i. Revisions pending to webpage
  - ii. MCLE Requirements link on home page links to old requirements

ACTION ITEM: Emmalee Atencio to post to Facebook page announcing changes to webpage once they have gone live.

- d. CLE Coordination Committee
  - i. September CLE event offered for free, materials to be posted to webpage once CLE is complete
  - ii. Discussion of December CLE
    - 1. Auditorium is reserved but may need to be offered via Zoom

ACTION ITEM: Emmalee Atencio to post CLE materials to Facebook page after September CLE complete. E-news/Webpage committee to post materials to CLE Resources tab once September CLE complete.

- e. CLE Tracking Committee
  - i. Rerouting CLE submissions made directly to committee to submit via online form
- f. Election Committee



i. Elections for 2021

ACTION ITEM: Emmalee Atencio to make periodic reminder posts to Facebook page leading up to October 15 submission deadline.

g. Membership Committee

i. Five requests regarding qualification for Division made

ii. Bench and Bar has been mailed out to members

h. Scholarship Committee

i. Extensive discussion regarding scholarship requirements

1. Questions regarding in-person class requirement, ABA qualified programs, NM schools only, NM residency requirements, Certification reimbursement

2. Discussion tabled until readjournal after planning session

RECESS for lunch and planning session at 12:34 p.m.

READJOURN Board meeting following planning session at 2:28 p.m.

ACTION ITEM: Angela Minefee to resubmit proposed schedule and budget for 2021 by October 3, 2020

ACTION ITEM: Linda Sanders to contact State Bar regarding room availability for proposed meeting and CLE dates and inquiry as to date for Annual Meeting.

i. Scholarship Committee – continued

i. Motion to proceed with scholarship flyer and offer as drafted for 2021.

1. Motion by Emmalee Atencio, second by Linda Sanders; Debbie Tope and Nettie Condit vote no, all others vote in favor, motion passed

ii. Scholarship committee to review scholarship program for changes as discussed in meeting

**V. Old business**

a. PD Working Group

b. Proclamation still not received from governor's office

**VI. New business**

a. Discussion about limiting the amount of email traffic sent to board between meetings

b. Discussion about voting on email motions made between board meetings. Each member should announce explicit vote even if that member made the motion or second the motion.

**VII. Adjournment**



- a. Motion to adjourn made by Angela Minefee, second by Nettie Condit. Motion passed. Meeting adjourned at 2:51 p.m.

Minutes submitted by: Emmalee Atencio, Acting Secretary

**OFFICER REPORTS**

**PARALEGAL DIVISION  
BOARD MEETING  
September 19, 2020**

## CHAIR REPORT

**CHAIR** **Yolanda Hernandez**

**DATE OF REPORT:** September 19, 2020

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

### Paralegal Division Activities:

- Review and respond to electronic media correspondence with the State Bar Center, members, potential members and the Board
- Prepare Agenda for the September 19, 2020 Board Meeting

### Board of Bar Commissioners Activities:

- Monitor electronic media correspondence from BBC in preparation of the Board meeting scheduled for September 24, 2020

**ISSUES REQUIRING BOARD ACTION:** None.

**COMMENTS:**

**PARALEGAL DIVISION  
BOARD MEETING  
SEPTEMBER 19, 2020**

**CHAIR-ELECT REPORT**

**CHAIR-ELECT**

Angela Minefee

**ACTIVITIES UNDERTAKEN**

As we enter six months in quarantine, my plans to host monthly lunch get-togethers around town have been derailed. Once it is safe to gather in groups, I plan to reinitiate efforts for informal networking and lunch events.

Following the last board meeting, we scheduled and held three virtual gatherings. Each meeting was scheduled on various days and times of the week to accommodate as many people as possible. Although members would register for the events, most did not attend. I am taking some time to retool the scheduling and topics, holding out hope that we can still make this work.

My time on the membership committee has allowed me the opportunity to reach out to new members and offer support. Kathy and Kay have been so very gracious and answered all of questions about qualifications. I hope to use this knowledge to encourage new membership during my term as Chair.

During the final quarter of this year, I plan to focus my energy and efforts to (finally) completing the newsletter. Then, I intend to create a plan for producing offerings on a quarterly basis.

Respectfully submitted,

Angela Minefee

## **COMMITTEE REPORTS**

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

**Committee Title:** Budget & Finance Committee

**Committee Chair:** Kay L. Homan, CP

**Date of Report:** September 19, 2020

**RE:** Treasurer's Report Q1

Budget vs. Actual as of 8/31/20 is attached.

Respectfully submitted,

Kay L. Homan, CP  
Treasurer

## State Bar of New Mexico, Paralegal Division

### 2020 Budget vs. Actual

	Starting Balance	Ending Balance
1000 Checking 403-8	\$56,657.14	\$54,334.07

Income	Budget	Actual	% to Budget
4805 CLE Provider Approvals	\$ 6,000.00	\$ 6,150.00	103%
4500 CLE Seminars	\$ 1,000.00	\$ 420.00	42%
4300 Earned Interest	\$ 100.00	\$ 59.39	59%
4000 Membership Dues	\$ 9,000.00	\$ 8,605.00	96%
<b>Total Income</b>	<b>\$ 16,100.00</b>	<b>\$ 15,234.39</b>	<b>95%</b>

Expenses	Budget	Actual	% to Budget
6741 CLE Expenses	\$ 1,000.00	\$ 692.49	69%
5250 Contract Labor	\$ 5,200.00	\$ 3,881.25	75%
6110 State Bar Administrative Fees	\$ 1,500.00	\$ 689.31	46%
6140 Donations/Contributions	\$ 6,000.00	\$ -	0%
6310 Mileage/Travel Reimbursements	\$ 500.00	\$ 56.11	11%
6995 Miscellaneous Expenses	\$ 200.00	\$ -	0%
6210 Postage	\$ 100.00	\$ 7.50	8%
6230 Office Supplies	\$ 150.00	\$ 46.34	31%
6230 Commemorative Gifts	\$ 3,000.00	\$ 3,177.83	106%
### Member Benefits	\$ 4,000.00	\$ 1,975.00	49%
6210 Printing and Reproduction	\$ 150.00	\$ 99.79	67%
6160 Receptions & Meetings	\$ 6,000.00	\$ 3,798.57	63%
6751 Scholarships	\$ 1,000.00	\$ -	0%
<b>Total Expenses</b>	<b>\$ 28,800.00</b>	<b>\$ 14,424.19</b>	<b>50%</b>

Member gift cards in lieu of anniversary lunch  
credited to 6160

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION  
BYLAWS COMMITTEE REPORT**

**COMMITTEE CHAIR:** Kay L. Homan, CP

**COMMITTEE MEMBERS:** Nettie Condit, Ruby Silva. Kathy Campbell

**DATE OF MEETING:** September 19, 2020

**ACTIVITIES UNDERTAKEN:**

**ONGOING ACTIVITIES:**

The revisions to the Standing Rules were approved by the Board on April 14, 2020. The Standing Rules have been finalized and posted on the Webpage. If the Board votes to eliminate the Scholarship Committee, we will revise the Standing Rules to eliminate this Standing Committee.

The Bylaws Committee is available to the Division Chair for assistance with any parliamentary procedures as needed pursuant to the provisions of the Standing Rules.

**ISSUES REQUIRING ACTION:**

**ATTACHEMENTS:**

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** Web Page Committee/ENews Committee

**COMMITTEE COCHAIRS:** Deborah R. Tope, Amy Meilander

**DATE OF REPORT:** September 19, 2020

### **ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

During this last quarter, the committee has posted updated CLE Credit & CLE Totals tables and the 2020 membership directory and inactives lists. The calendar of events has been updated regularly to reflect the changes in BOD meetings as needed due to the ongoing COVID-19 pandemic. We have continued to post welcome to new members in addition to sending them information for access to the web page. The PD's job bank has been very active during the last 2 months and we have posted numerous position openings that we hope are helpful to PD members during this difficult employment period.

Under the direction of the CLE Tracking Subcommittee, we have created a new page titled "CLE Resources" with the new CLE submission process and other CLE-related materials.

The web page committee now plans to revise the existing "CLE Credits Table & Member Directory" to create a new page titled "Member Resources" which will combine files currently found on the home page with links to Social Media, other forms and the member directory.

The Pro Bono Opportunities page will be updated when events resume.

The web page committee will continue to maintain the Division's web page with activities, CLE programs, Pro Bono Opportunities & updated membership directory & CLE credit tables and submit any relevant information for inclusion in the weekly ENews.

**ISSUES REQUIRING BOARD ACTION:** None

**PARALEGAL DIVISION**

**SEPTEMBER 19, 2020 BOARD MEETING**

**COMMITTEE TITLE:** **SOCIAL MEDIA SUB-COMMITTEE**

**COMMITTEE CO-CHAIRS:** **EMMALEE ATENCIO**  
**YOLANDA HERNANDEZ**

**COMMITTEE MEMBER:** **N/A**

**DATE OF MEETING:** **SEPTEMBER 19, 2020**

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- Facebook
  - Moderated activity in Facebook page
  - Approved new members
  - Maintained event calendar
- Twitter
  - Moderated activity
- Other
  - Reviewing possibility of other social media accounts for division including Instagram and LinkedIn

**PARALEGAL DIVISION  
BOARD MEETING  
September 19, 2020**

**CLE COORDINATION SUB-COMMITTEE REPORT**

**COMMITTEE CHAIR:** Linda Sanders

**COMMITTEE MEMEBR:** Angela Minefee

**DATE OF REPORT:** September 19, 2020

**ACTIVITIES SINCE LAST REPORT:**

September 26, 2020: The State Bar is reserved for this event, however, given the uncertainty of the current health crisis and the success of the Zoom format for the May CLE, the Committee has decided to offer the CLE exclusively via Zoom. The topics for this CLE are Trial Preparation and Electronic Discovery. The presenters for the event are Margaret “Peggy” Graham and Lalita Devarakonda. Advertisement has been running in the Bar Bulletin, a flyer has been posted on the Division website and an email blast sent to the membership.

**UPCOMING EVENTS:**

December 4, 2020: The Institute CLE: The State Bar is reserved for this event, however given the uncertainty of the current health crisis, this event may need to be re-evaluated. No plans have been started. The Committee will provide an update/request input from the Board as necessary at a time closer to the event.

**ISSUES REQUIRING BOAR ACTION:** None.

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

**Committee Title:** CLE Provider(s) Approvals Committee

**Committee Chair:** Kay L. Homan, CP

**Date of Report:** September 19, 2020

**RE:** Quarter 3 Report

We have \$6,150.00 for CLE Approvals through August 31, 2010. I deposited \$450.00 so far in September. Attached is list of pending IPE CLE's (some dates have already passed).

09/09/20	86570	3 General	A Paralegal's Guide to Personal Injury: Working with Medical Providers and
		5 General, 1	
08/05/20	86572	Ethics	Motor Vehicle Accidents: A Crash Course for Paralegals
		5 General, 1	
09/02/20	86422	Ethics	Paralegal's Guide to Family Law
09/17/20	86552	3 General	A Paralegal's Guide to Aging Medical Chronologies
10/06/20	87782	1 Ethics	How to Avoid Unauthorized Practice of Law: A Paralegal's Guide
10/07/20	87769	1 General	Medicare and Medicaid Liens: Changes Paralegals Need to Know
08/12/20	86495	6 General	Mastering the Intangibles for Paralegals
10/08/20	87784	3 General	Organizing SSDI Claims for Paralegals
10/15/20	87770	3 General	Criminal Law - Best Practices for Paralegals
09/11/20	86566	1 General	Federal Court: E-Filing, Discovery and Other Case Management Tips for Pa
		5 General, 1	
08/26/20	86573	Ethics	Land Use and Zoning for Paralegals
08/04/20	86562	1 General	Secrets of Highly Successful Paralegals
08/18/20	86568	1 General	Probate for Paralegals: Reading and Organizing Financial and Tax documents
		5 General, 1	
09/16/20	86574	Ethics	An Investigator's Guide for Paralegals: How to Get the Info You Need
		5 General, 1	
09/23/20	86575	Ethics	Probate and Estate Administration for Paralegals
09/29/20	86571	2 Ethics	Top 6 Ethical Mistakes Paralegals Make
		5 General, 1	
09/30/20	86496	Ethics	Real Estate Boot Camp for Paralegals
10/14/20	87783	3 General	Paralegal Skills: Finding Debtors and Their Assets
09/15/20	86567	1 General	Paralegal's Guide to Bankruptcy - 2020 Update
		5 General, 1	
10/22/20	87765	Ethics	Litigation Boot Camp for Paralegals
10/28/20	87768	1 General	Discovery in Construction Litigation for Paralegals
10/13/20	87773	6 General	Paralegal's Guide to Complex Divorce Cases
11/03/20	87786	2 Ethics	Dealing with Difficult Clients: Ethical Considerations for Paralegals
11/05/20	87785	1 General	Estate Accounting Basics for Paralegals
11/10/20	87788	3 General	What Paralegals Need to Know About Business Contracts
11/12/20	87776	2 General	Investigation & Online Search Techniques
		5 General, 1	
11/16/20	87781	Ethics	Top 50 Mistakes Paralegals Make in Personal Injury Litigation
		5 General, 1	
11/19/20	87780	Ethics	Requesting, Reviewing and Summarizing Medical Records
11/18/20	87775	1 General	Organizing the Estate Inventory (with Sample Checklists and Excel Tips)
11/23/20	87774	1 General	Assertiveness Skills for Paralegals: Getting What You Want

09/09/20	86570	3 General	A Paralegal's Guide to Personal Injury: Working with Medical Providers and
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**PARALEGAL DIVISION**

**SEPTEMBER 19, 2020 BOARD MEETING**

**COMMITTEE TITLE:** CLE TRACKING

**COMMITTEE CHAIR:** EMMALEE ATENCIO

**COMMITTEE MEMBER:** KAY HOMAN

**DATE OF MEETING:** SEPTEMBER 19, 2020

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- Developed and tested an online form for submitting CLEs to tracking committee
- Created Sponsor Certification form to replace the Pro Bono Form, Self-Study Form, and Pre-Approval Form
- Drafted revised MCLE Guidelines
- Sent link to online form, revised guidelines, and new form to Web page committee for posting to website
- Answered member questions regarding CLE credits and recorded member CLE credit submissions

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** ELECTION COMMITTEE  
**COMMITTEE CHAIR:** RUBY SILVA  
**COMMITTEE MEMBER:** NETTIE CONDIT  
**DATE OF MEETING:** SEPTEMBER 19,2020

### **ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

The Election Committee sent out the Declaration of Candidacy Form to all members in good standing on September 15, 2020. The deadline to return the Candidacy Form to the Committee is October 15,2020.

The following positions are open: Chair-Elect, Treasurer, Secretary and three (3) Director positions.

The Directors who go off the Board this year are Nettie Condit, Linda Sanders, Debbie Tope.

**ONGOING ACTIVITIES:** The Elections will start in November. The Ballots will be emailed to all members in good standing by the State Bar with reminders sent to the members that have not voted.

### **ISSUES REQUIRING BOARD ACTION:**

None.

### **ATTACHMENTS:**

None

### **COMMENTS:**

None

## PARALEGAL DIVISION

**COMMITTEE TITLE:**                   **Membership**

**COMMITTEE:**                       **Angela Minefee and Kathy Campbell (Co-Chairs)**  
   **Kay Homan and Emmalee Atencio (Members)**

**DATE OF REPORT:**               **September 14, 2020**

### **2020 Membership Activity:**

The following ten (10) members have been approved to date in 2020:

Sarah Archuleta, Taos – approved February 11  
Lorraine Chavez, Albuquerque – approved January 8  
Vanessa Griego, Albuquerque – approved March 20  
Matthew Lucero, Albuquerque – approved August 26  
Desiree Maynard, Lovington – approved March 13  
Ariel Murray, Las Cruces – approved June 2  
Andrea Pompeo, Albuquerque – approved August 14  
Pamela Stuchly, Albuquerque – approved January 8  
Devany Whipple, Las Cruces – approved January 6  
Veronica Velasquez-Parra – approved September 14

We currently have 127 active members and 11 inactives.

**PARALEGAL DIVISION  
BOARD MEETING  
September 19, 2020**

**COMMITTEE:**      **Pro-Bono/ Community Service Committee Report**

**COMMITTEE CHAIR:**    **Linda Sanders**

**DATE OF MEETING:**      **September 19, 2020**

**ONGOING ACTIVITIES:**

Unfortunately, due to the current health crisis, all events continue to be cancelled. The Chair of the Committee continues communication with sponsors of the various pro bono events in an effort to be prepared to support events and inform our membership when events resume.

**ISSUES REQUIRING BOARD ACTION:**      None.

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** Scholarship Committee Report

**COMMITTEE CHAIR:** NETTIE CONDIT

**COMMITTEE MEMBERS:** Carolyn Winton, Kay Homan, Ruby Silva

**DATE OF MEETING:** September 19, 2020

### **ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

Scholarship Chair contacted the committee about tabling the 2021 scholarship awards and all were in agreement to do so. A motion was made by the Chair to the Board, but said motion failed. I contacted committee members again requesting input for discussion at the board meeting on options for the Scholarship Committee. The combined discussion points are below in the comments section of this report.

Chair contacted ABA regarding online courses and what they required for certification of a program. Their comment is that as part of their ABA approved program, the program can be totally online, so long as at least nine semester credits or the equivalent are offered in synchronous instruction.

Chair contacted Christina Babcock regarding whether CNM would be holding synchronous instruction, to which she replied no, only online classes.

Chair contacted Emmalee Atencio regarding the program at NMSU to see if it still existed. Emmalee replied that only the NMSU Alamogordo campus had an ongoing Paralegal Studies program. Contacted NMSUA regarding online, in person classes or synchronous instruction. Their reply was that their program was online, but some of their classes could be attended in person or with synchronous instruction.

Also researched were the Clovis Community College program and the Brookline program.

Flyer was revised if the scholarship program will continue.

**ONGOING ACTIVITIES:** Discussion on status of 2021 scholarship awards and committee status.

### **ISSUES REQUIRING BOARD ACTION:**

1. Since most of the paralegal study courses are online only with no synchronous instruction, the board needs to decide whether the scholarship committee is sunset or continues.
2. If the committee continues, the board needs to decide if scholarships will be awarded for the 2021 school year or tabled until 2022.

## **ATTACHMENTS:**

**Flyer**

**Rule 20-115**

**Paralegal Division Membership Guidelines**

## **COMMENTS:**

The Board of Directors needs to decide whether to keep, defer, or “sunset” the Scholarship Committee.

The Committee is in agreement with the following:

1. It is the Committee’s understanding that the sole purpose of awarding scholarships is to get new members when the qualifications for membership are met. Since 2012 NO scholarship recipient has joined the Division.
2. Currently no schools meet ABA certification criteria which allows online courses, so long as at least nine semester credits or the equivalent are offered in synchronous instruction. No current program does synchronous instruction.
3. Four schools – Brookline, CNM, Clovis Community College and New Mexico State University Alamogordo offer associate degrees (at least 60 credit hours). NMSU and Clovis also offer certificate programs (29-33 credit hours). NMSU certificate is ‘LEGAL ASSISTANT’ and Clovis calls its certificate ‘LEGAL ASSISTANT CERTIFICATE’. We do not know whether Brookline has a certificate program.
4. If we are going to offer scholarships, we need to be sure the applicant is working toward an associate degree and not quit at the certificate level. This may be difficult to do – we hope applicants will be honest.
5. Applicants must meet all other criteria: cumulative GPA of 3.0 or higher, provide transcript, appropriate number of hours of legal studies completed before applicant is eligible, enrolled in the next term, essay, complete contact information, etc.
6. Recommendation letter requirement may be hard to obtain since all classes are online without synchronous instruction. If we continue the scholarship awards, should we delete this until classes can resume at face to face or synchronous instruction?
7. Rule 20-115 and the Paralegal Division Membership Qualifications require at least an associate degree (minimum 60 hours). The Paralegal Division membership requirements also include several more criteria. Rule 20-115 and the Paralegal Division membership guidelines are attached.

8. The revised flyer for the 2021 school year is attached if the scholarship committee continues to exist. Normally the flyer goes out right after Labor Day with the application due date of November 1 and the award presented at the Institute luncheon in December. Since this has been delayed, it will not be sent out until October 1, so the deadlines have changed, and the Institute will probably not happen in person. The award(s), if any, will be mailed in January 2021.
9. The Committee is in agreement to “sunset” the committee, or in the alternative, to defer the scholarship award(s) until the 2022 school year (based on the outcome of the COVID-19 pandemic). The committee understands that NO program will be offering in person or synchronous instruction for some time in the future. CNM and Clovis Community College have only online classes. NMSU Alamogordo offers online classes, with some being available in person or with synchronous instruction.

# RULE 20-115

1

A paralegal shall meet one or more of the following educational, training or work experience qualifications:

- A. graduation from a paralegal program that is:
  - (1) approved by the American Bar Association;
  - (2) an associate degree program;
  - (3) a post-baccalaureate certificate program in paralegal studies; or
  - (4) a bachelor's degree program;
- B. graduation from a post-secondary legal assistant program which consists of a minimum of sixty (60) semester hours or equivalent, as defined by the American Bar Association Guidelines for the Approval of Paralegal Education Programs, of which at least eighteen (18) semester hours or equivalent are general education courses and eighteen (18) semester hours or equivalent are legal specialty courses;
- C. a bachelor's degree in any field plus two years of substantive law-related experience under the supervision of a licensed attorney. Successful completion of at least fifteen (15) semester hours of substantive paralegal courses may be substituted for one year of law-related experience;
- D. graduation from an accredited law school and not disbarred or suspended from the practice of law by the State of New Mexico or any other jurisdiction;
- E. certification by the National Association of Legal Assistants, Incorporated, the National Federation of Paralegal Associations, Incorporated or other equivalent national or state competency examination plus at least one (1) year of substantive law-related experience under the supervision of a licensed attorney; or
- F. a high school diploma or equivalent plus seven (7) years of substantive law-related experience under the supervision of a licensed attorney.

## Membership Qualifications

The Supreme Court of New Mexico officially created the Division in February 1995 by amending Rule 24-101.B of the Rules Governing the New Mexico Bar. In January 2004, the revised Rules Governing Paralegal Services were adopted setting forth the following qualifications for membership:

A person may become a member of the Paralegal Division if the person is employed as a paralegal in compliance with the definition of a paralegal found at Rule 20-102 of the Rules Governing Paralegal Services and the person meets one or more of the following qualifications:

(1) Graduation from a paralegal program that is either:

- a) approved by the American Bar Association;
- b) an associate degree program;
- c) a post-baccalaureate certificate program in paralegal studies; or
- d) a bachelor's degree program.

(2) Graduation from a post-secondary legal assistant program which consists of a minimum of sixty (60) semester hours or equivalent, as defined by the American Bar Association Guidelines for the Approval of Paralegal Education Programs, of which at least eighteen (18) semester hours or equivalent are general education courses and eighteen (18) semester hours or equivalent are legal specialty courses;

(3) A bachelor's degree in any field plus two (2) years of substantive law-related experience under the supervision of a licensed attorney. Successful completion of at least fifteen (15) semester hours of substantive paralegal courses may be substituted for one year of law-related experience;

(4) Graduation from an accredited law school and not disbarred or suspended from the practice of law by the State of New Mexico or any other jurisdiction; or

(5) Certification by the National Association of Legal Assistants, Incorporated, the National Federation of Paralegal Associations, Incorporated or other equivalent national or state competency examination plus at least one (1) year of substantive law-related experience under the supervision of a licensed attorney.

Applicants must certify that they:

(1) are not a convicted felon;

(2) have not been convicted in any state or federal court of any crime involving or related to a charge of moral turpitude;

(3) have not been the subject of and reprimanded or otherwise censured in any disciplinary or other similar proceeding involving my business affairs or other conduct involving the public;

(4) have not had a professional business license granted to me by the State of New Mexico, any other state, the federal government, or an agency of any of the foregoing revoked or suspended for breach of ethics or a charge relating to my character or personal fitness; and

(5) are otherwise mentally and morally fit to participate in the State Bar of New Mexico.

Applicants must further attest that they meet the following employment qualifications found at Rule 24-101A NMRA 2004:

(1) contracts with or is employed by an attorney, law firm, corporation, governmental agency or other entity;

(2) performs substantive legal work as defined in Rule 20-102 NMRA; and

(3) meets one or more of the educational and experience qualifications set forth above.

Persons interested in applying for membership in the Paralegal Division may submit an application using the form provided below.

[Membership Application](#) | [New Membership Renewal Deadlines](#) | [Committee Sign-Up Sheet](#)



## SCHOLARSHIP OPPORTUNITY

\*\*\*\*\*

Deadline to apply  
12-01-2020

The Paralegal Division of the State Bar of New Mexico may award scholarships to paralegal studies students that meet the requirements listed below. The scholarships will be awarded based on an applicant's academic excellence, letter of application and essay. The minimum scholarship awarded will be \$250 in the form of a check.

**An eligible applicant must:**

1. Be currently registered as a full-time student (minimum of 12 credit hours) or part-time student (minimum of 6 credit hours) in a paralegal program which offers an Associate's degree (AT LEAST 60 CREDIT HOURS) at a junior college, community college or university within New Mexico and have completed a minimum of 12 credit hours in a paralegal studies program at the time of application, **and be enrolled in a paralegal program for the next term.**
2. Demonstrate academic excellence; and
3. Be a legal resident of New Mexico.

**Applicants must submit a letter of application no later than December 1, 2020 to be eligible for a scholarship to be awarded in January 2021.**

The letter of application must include the following:

- A. A copy of transcript(s) of grades from the junior college, community college or university showing a minimum 3.0 (based on a 4-point scale) **cumulative** grade point average and a minimum of 12 credit hours completed in the paralegal studies program;
- B. A letter of recommendation from a paralegal course instructor from the junior college, community college or university;
- C. An essay with a minimum of 500 words (and no more than 1,000 words) stating the reason why the student desires to become a paralegal, what the paralegal student plans to do with their paralegal education in the future, and how that education can benefit New Mexico or their community; and
- D. Complete contact information (name, address, telephone number, cell phone number, e-mail address)

Scholarship applications must be postmarked by **December 1, 2020** to be considered for the 2021 school year at the following address: **Scholarship Committee, Paralegal Division, State Bar of New Mexico, PO Box 1923, Albuquerque, NM 87103** or submit via e-mail to [pdscholar@yahoo.com](mailto:pdscholar@yahoo.com). Please note "PD Scholarship Application" and your name in the subject line.

Past winners of Paralegal Division scholarships are eligible to apply for future scholarships based on the same criteria and requirements shown above. The award of a scholarship will not be a guarantee of future scholarship awards.

**NOTE: Applications which do not include the above listed information will not be considered.**

**NOTE: No phone calls will be accepted from scholarship applicants regarding scholarship information or questions. All informational requests must be made in writing to the above address or be e-mailed to [pdscholar@yahoo.com](mailto:pdscholar@yahoo.com) with "PD Scholarship" noted in the subject line.**

**PARALEGAL DIVISION**

**SEPTEMBER 19, 2020 BOARD MEETING**

**COMMITTEE TITLE:** AD-HOC 25th ANNIVERSARY COMMITTEE

**COMMITTEE CHAIR:** EMMALEE ATENCIO

**COMMITTEE MEMBER:** DEBBIE TOPE, LINDA SANDERS, DAWNE  
ROBERTO, ANGELA MINEFEE

**DATE OF MEETING:** SEPTEMBER 19, 2020

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- Aug. 22 anniversary dinner cancelled in light of current health orders and limitations on restaurant seating and group gatherings
- Board moved and approved \$15 gift cards to all members in lieu of cancelled anniversary dinner
- All gifts mailed to members
- Posts to Facebook page regarding anniversary
- Email to members regarding gift mailing