



**BOARD MEETING
STATE BAR OF NEW MEXICO
SATURDAY, SEPTEMBER 19, 2020
AGENDA**

Meeting called to order at: _____

(April 18 Minutes to be amended & approved later)

I. Approval of minutes of Board meeting held on April 18, 2020: Minutes Attached

II. Approval of minutes of Board meeting held on June 27, 2020: Minutes Attached

III. Officer Reports

| | | |
|----------------------|-------------------|--------------------|
| Chair | Yolanda Hernandez | Report Attached |
| Chair-Elect | Angela Minefee | Report Attached |
| Immediate Past Chair | Lynette Rocheleau | No Report |
| Secretary | Brandi Nastacio | Minutes of Meeting |
| Treasurer | Kay L. Homan, CP | Report Attached |

IV. Standing Committee Reports

| | | |
|----------------------------|------------------------|-----------------|
| Budget and Finance | Kay L. Homan, CP | Report Attached |
| Bylaws and Rules | Kay L. Homan, CP | Report Attached |
| ENews/Web Page | Debbie Tope, CP, RP | Report Attached |
| | Amy Meilander | |
| Social Media | Emmalee Atencio, ACP | Report Attached |
| CLE-Coordination | Linda Sanders | Report Attached |
| CLE-Provider Approvals | Kay L. Homan, CP | Report Attached |
| CLE Tracking | Emmalee Atencio, ACP | Report Attached |
| Nominating & Elections | Ruby Silva | Report Attached |
| Events Coordination | Dawne Roberto | No Report |
| Membership | Kathleen Campbell, ACP | Report Attached |
| | Angela Minefee | |
| Pro Bono/Community Service | Linda Sanders | Report Attached |
| Professional Development | Emmalee Atencio, ACP | No Report |
| | Ruby Silva | |
| Scholarship Committee | Nettie Condit | Report Attached |

Special Committee:

| | | |
|-------------------------------------|----------------------|-----------------|
| Ad-Hoc 25 th Anniversary | Emmalee Atencio, ACP | Report Attached |
|-------------------------------------|----------------------|-----------------|

V. Old Business:

- Proclamation Paralegal Day – August 26, 2020. Kay reported she sent request to Governor Michelle Lujan-Grisham on May 2020. Status.

VI. New Business:

- **Discussion** (Debbie Tope):
 - 1) A brief discussion as to any updates/progress folks may have made on PDWG topics;
 - 2) A brief discussion related to reducing e-mail traffic among BOD/committee chairs to include sending welcomes to new members by “reply all”; and
 - 2a) Any discussion related to #2 above with respect to voting by e-mail.
- **Discussion:** The Institute CLE and Holiday Dinner (December 4, 2020)

Planning Session by Angela Minefee, Chair Elect.

VII. Adjournment at _____.

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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% |
| Total Income | \$ 16,100.00 | \$ 15,234.39 | 95% |

| 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% |
| Total Expenses | \$ 28,800.00 | \$ 14,424.19 | 50% |

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 |
| | | 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 |
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| 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 |
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| 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 |

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. 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 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

**MINUTES FOR APPROVAL BY THE
BOARD FROM DIVISION MEETINGS
HELD ON APRIL 18 AND JUNE 27, 2020**

(April 18 Minutes to be amended & approved later)



Meeting Minutes

June 27, 2020

I. Call to Order

Chair, Yolanda Hernandez, called to order the regular meeting of the SBNM Paralegal Division Board of Directors at 11:10 a.m. on June 27, 2020. Meeting held via Zoom conference.

II. Attendees

Board of Directors: Yolanda Hernandez, Chair
Angela Minefee, Chair Elect
Lynette Rocheleau, Immediate Past Chair
Kay Homan, Treasurer
Emmalee Atencio, Director
Dawne Roberto, Director
Linda Sanders, Director
Debbie Tope, Director
Nancy Torres, Director

Members: Kathy Campbell, Division Administrative Assistant
Devany Whipple

Board of Directors not in attendance:
Brandi Nastacio, Secretary
Nettie Condit, Director

III. Approval of minutes from last meeting

The minutes from the last meeting were not submitted 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.

IV. Reports

See agenda for full reports submitted by Board of Directors and Committees.

a. Chair Report

- i. Discussion of co-sponsorship of Workforce Solutions event by attorney Deian McBryde. Not to co-sponsor this event. Need additional information before agreeing to co-sponsor any future events.



- ii. ACTION ITEM: Nancy Torres to email McBryde regarding further information for events.
 - iii. Discussion of submission to SBNM eNewsletter, SDC Digest.
 - iv. ACTION ITEM: CLE Coordination committee to send September CLE information to SBNM for inclusion in eNewsletter.
 - b. Chair Elect Report
 - i. Discussion of Zoom happy hour events
 - c. Treasurer Report/Budget and Finance Committee
 - i. Discussion of line items to budget
 - ii. ACTION ITEM: Amended Budget vs. Actual report to be sent to Board.
 - d. CLE Coordination Committee
 - i. Moving forward with planning September event. Too early to make decisions regarding December event.
- V. Old business**
 - a. PD Working Group
 - i. Working group to continue working
 - ii. Discussion of networking events, social media, CLEs
 - iii. Discussion of Newsletter inclusions of Brown Bag synopsis, etc.
 - iv. ACTION ITEM: Each member of Board to send Brown Bag topics to Linda Sanders for future events
- VI. New business**
 - a. New location possibly needed for Anniversary lunch depending on COVID-19 restrictions for restaurants
 - b. Discussion regarding extension of time to submit CLEs or to complete CLEs. Extension would cause issues with registration and renewals for 2021. CLE tracking and Membership committees to discuss and present issue if needed. Further discussion on topic tabled.
 - c. Discussion regarding making September CLE registration free to members.
 - d. Discussion regarding September Board meeting to be held in Las Cruces
- VII. Adjournment**
 - a. Motion to adjourn made by Lynette Rocheleau, second by Nancy Torres. Motion passed. Meeting adjourned at 1:53 p.m.

Minutes submitted by: Emmalee Atencio, Acting Secretary

PARALEGAL DIVISION
Board Meeting
June 27, 2020

CHAIR: **Yolanda Hernandez**

DATE OF REPORT **June 27, 2020**

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- I attended remotely via Go to Meeting the Annual Awards Committee meeting on June 9, 2020. The Committee did not receive any nominations for the Justice Pamela B. Minzner Professionalism Award but received nominations for the following awards:

Judge Sarah M. Singleton Distinguished Service Award – **Deborah Dungan**
Distinguished Bar Service-Non-Lawyer Award – **Renee Valdez**
Outstanding Legal Organization of Program Award – **NM Immigrant Law Ctr**
Outstanding Young Lawyer of the Year Award – **Veronica Gonzales-Zamora**
Robert H. La Follette Pro Bono Award – **Julia Barnes**
Seth D. Montgomery Distinguished Judicial Service Award – **Judge Alvin Jones**

- I attended remotely via Go to Meeting the **Board of Bar Commissioners** (BBC) Two-Day Board Meetings held on June 18 and 19, 2020: (1) Finance Committee; (2) Bar Foundation; and (2) Strategic Planning Sessions. The following are highlights of these meetings:
 - The Bar exam extended to September 2020 subject to change. Students to work with the supervision of a licensed attorney and must be registered for Bar exam. The LLLT may be reconsidered due to Covid-19 pandemic.
 - The SBNM's Annual September meeting to be held virtually, and four (4) CLE credit hours to be offered at no cost to its members
 - The BBC moved and passed to create the Family Law Legal Specialization Commission.
 - Overall the consensus is to: (1) Enjoy service to the State Bar; (2) offer benefits to members of the State Bar, (3) work with the Division's Board of Directors throughout the year is encouraged; (4) and service to the public.

ISSUES REQUIRING BOARD ACTION:

- Co-Sponsorship with Deian McBryde Esq. re NM Workforce Solutions (**Attachment**)
- SDC Digest – Paralegal Day (7/9/20 Edition, ENewsletter) (**Attachment**)
- Paralegal Day/Anniversary Celebration: August 22, 2020
- Board Meeting: September 19, 2020
- The Institute CLE December 4, 2020
- Holiday Dinner December 4, 2020 (TBD)

Hernandez, Yolanda K.

From: Deian McBryde <deian@mcbrydelaw.com>
Sent: Friday, June 26, 2020 10:50 AM
To: Hernandez, Yolanda K.; Allison Block-Chavez Esq.; Kate Rubi Esq.
Cc: Isaac S. Emmanuel, Esq.; Cindy Silva Esq.; Morgan Pettit
Subject: Opportunity for SLD/YLD/SSF/Paralegal collaboration

Dear Kate, Allison, and Yolanda

I'm writing to ask for your support for a potential event that might happen NEXT WEEK. I've talked with Andrea Cristman from NM Department of Workforce solutions and she's willing to answer questions from Bar members about their rights to apply for unemployment benefits, especially with the COVID-19 additional benefit, for self-employed folks, like solo/small practitioners, contract attorneys, and contract paralegals and other staff. We might even get the department secretary involved.

The Solo and Small Firm Section (Interaction Committee) is on board with doing this and so I'm going ahead with organizing the video chat for live attendance or streaming through the Bar. But, rather than do it alone, we're hoping to get the word out as far as possible and so we're asking your divisions to co-sponsor this with us.

There are no costs. We'll either record it on the Bar's GoToWebinar or my Zoom account. All we're asking is to 1) include your division in promoting the event, 2) send a email inviting your division members to participate, and 3) your enthusiasm for this collaboration!

Please reply to ASAP. It would be GREAT to hear from you by Monday or sooner so we can e-blast membership about the chat.

Call me (505-340-6052) or drop me a note if you have questions.

Best,

Deian

Deian McBryde, Esq.
McBryde Law LLC
(505) 465-9086
deian@mcbrydelaw.com
www.mcbrydelaw.com

Hernandez, Yolanda K.

From: Morgan Pettit <mpettit@nmbar.org>
Sent: Thursday, June 25, 2020 10:38 AM
To: Hernandez, Yolanda K.
Subject: Paralegal Highlight in Newsletter
Attachments: SCD Digest Template (1).pdf

Hello Yolanda,

Hope all is well! I am planning on doing a July 9th edition of the relatively new eNewsletter, the SCD Digest.

What would you like to include for the Paralegal Division? I have attached the page that includes the meeting dates and a Division highlight. Looks like you have a few things coming up so just let me know what you'd like to share! I'd need event details and a brief description, around 150 words.

If I can get this by July 2nd, that would be awesome.

Thank you!

Best,

Morgan Pettit

(she/her/hers/Ms.)

Member Services Coordinator, State Bar of New Mexico

5121 Masthead NE, ABQ, NM 87109 | PO Box 92860, Albuquerque, NM 87199

(505) 797-6039 | Fax: 866-767-7281 | mpettit@nmbar.org | www.nmbar.org



MEETING DATES

Paralegal Division - Date, Day, Time

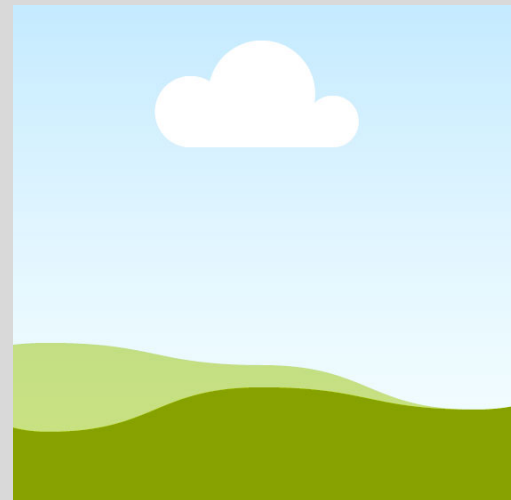
Senior Lawyers Division - Date, Day, Time

Young Lawyers Division - Date, Day, Time

SENIOR LAWYERS

Upcoming Event

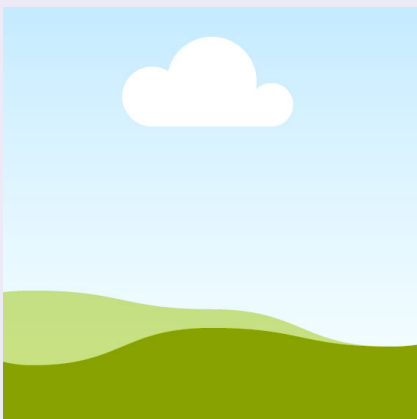
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PARALEGALS DIVISION

Upcoming Event

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**PARALEGAL DIVISION
BOARD MEETING
JUNE 27, 2020**

CHAIR-ELECT REPORT

CHAIR-ELECT Angela Minefee

ACTIVITIES UNDERTAKEN

Since my last report, I have continued to learn and ask more questions about membership qualifications and trends. It is my goal during my term as Chair-Elect to make myself available to new members and continue to develop insights and objectives for a successful term as Chair.

Recently, I have offered to assist the CLE Tracking Committee to develop improved and efficient methods for members to request CLE and *pro bono* credits. Together, we are working to create a JotForm submission that will streamline the submission process and reduce the work involved in tracking the information.

Unfortunately, the current pandemic has derailed my plans to host monthly lunches around town. Sadly for my waistline, I am left with a drawer full of chocolates.

Respectfully submitted,

Angela Minefee

**PARALEGAL DIVISION
BOARD MEETING**

JUNE 27, 2020

SECRETARY: **Brandi Trujillo (c/o Chair)**
DATE OF REPORT: **June 27, 2020**

ISSUES REQUIRING BOARD ACTION:

Approval of minutes of Board of Directors' meeting held on April 18, 2020.

COMMENTS:

Per the Standing Rules, the resolution of the minutes of the April 18, 2020 meeting shall be conducted by electronic media vote. The Secretary, Brandi Trujillo, shall canvass the Board members at the next BOD meeting to ratify the results of the electronic media vote and the results of such canvass shall be recorded in the minutes,

**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: June 27, 2020

RE: Treasurer's Report

Budget vs. Actual as of 5/31/20 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 | \$52,767.44 | \$59,824.67 |

| Income | Budget | Actual | % to Budget |
|-----------------------------|---------------------|---------------------|-------------|
| 4805 CLE Provider Approvals | \$ 6,000.00 | \$ 5,175.00 | 86% |
| 4500 CLE Seminars | \$ 1,000.00 | \$ - | 0% |
| 4300 Earned Interest | \$ 100.00 | \$ 39.90 | 40% |
| 4000 Membership Dues | \$ 9,000.00 | \$ 8,530.25 | 95% |
| Total Income | \$ 16,100.00 | \$ 13,745.15 | 85% |

| Expenses | Budget | Actual | % to Budget |
|------------------------------------|---------------------|--------------------|-------------|
| 6741 CLE Expenses | \$ 1,000.00 | \$ 2,447.49 | 245% |
| 5250 Contract Labor | \$ 5,200.00 | \$ 2,581.50 | 50% |
| 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 | \$ 169.07 | 6% |
| ### Member Benefits | \$ 4,000.00 | \$ - | 0% |
| 6210 Printing and Reproduction | \$ 150.00 | \$ 99.79 | 67% |
| 6160 Receptions & Meetings | \$ 6,000.00 | \$ 1,350.69 | 23% |
| 6751 Scholarships | \$ 1,000.00 | \$ - | 0% |
| Total Expenses | \$ 28,800.00 | \$ 7,447.80 | 26% |

| | | |
|-----------------------------|------------------|------------|
| Note: CLE Expenses includes | SB Admin Fees of | \$1,975.00 |
| and | Zoom Purchase | \$161.70 |

**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: June 27, 2020

ACTIVITIES UNDERTAKEN: Finalizing and Posting Revised Standing Rules

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. Thank you to the members who work on this project.

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: June 27, 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 Division's Standing Rules have also been updated and posted along with the committee sign-up form as revised to conform to the updated Standing Rules. The committee description and chair list was also updated and revised to conform to the updated Standing Rules and posted.

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 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.

ISSUES REQUIRING BOARD ACTION: None

PARALEGAL DIVISION

JUNE 27, 2020 BOARD MEETING

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

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

COMMITTEE MEMBER: **N/A**

DATE OF MEETING: **JUNE 27, 2020**

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Facebook
 - Moderated activity in Facebook page
 - Approved new members
 - Maintained event calendar
- Twitter
 - Began protected account
 - Posted link to June 27 meeting
- Other
 - Reviewing possibility of other social media accounts for division including Instagram and LinkedIn

**PARALEGAL DIVISION
BOARD MEETING
June 27, 2020**

CLE COORDINATION SUB-COMMITTEE REPORT

COMMITTEE CHAIR: Linda Sanders

COMMITTEE MEMEBR: Angela Minefee

DATE OF REPORT: June 27, 2020

ACTIVITIES SINCE LAST REPORT:

Barbara Lucero resigned as Co-Chair of the Committee.

May 30, 2020: Family Law CLE: The CLE was conducted exclusively in video conference format utilizing the Zoom license purchased by the Division. Twenty-four (24) members attended the event. Angela Minefee served as host/moderator. Topics were: Cannabis and Child Custody, presented by Carlos Martinez; Kinship Guardianship, presented by Jensen Wallace; and Parenting Plans, presented by Martha Kaser. Use of the Zoom format was well received by the participants and the presenters and the event was a success.

UPCOMING EVENTS:

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 is prepared to offer the CLE exclusively via Zoom. A decision will be made closer to the event. Based on a short survey conducted at the conclusion of the Family Law CLE, the anticipated topics for this CLE are Trial Preparation and Electronic Discovery. The Committee is working to secure presenters for the event.

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.

ISUES 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: June 27, 2020

RE: CLE approvals

Continue approvals of NBI-IPE CLE's. Budget shows income received from NBI.

| Approved | Provider | Date | Course # | Credits |
|----------|----------|----------|----------|---------------------|
| 01/02/20 | IPE | 04/15/20 | 85212 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 04/14/20 | 85217 | 1 General |
| 01/31/20 | IPE | 05/19/20 | 85806 | 3 General |
| 01/31/20 | IPE | 06/17/20 | 85025 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 05/12/20 | 85819 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 05/13/20 | 85815 | 3 General |
| 01/31/20 | IPE | 04/02/20 | 85216 | 1 General |
| 01/31/20 | IPE | 04/30/20 | 85202 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 03/23/20 | 85207 | 1 General |
| 01/31/20 | IPE | 04/23/20 | 85206 | 3 General |
| 01/31/20 | IPE | 04/22/20 | 85204 | 5 General, 1 Ethics |
| 02/05/20 | IPE | 04/21/20 | 85220 | 1 Ethics |
| 02/06/20 | IPE | 05/27/20 | 85802 | 5 General, 1 Ethics |
| 01/14/20 | IPE | 05/06/20 | 85808 | 5 General, 1 Ethics |
| 02/18/20 | IPE | 04/23/20 | 85818 | 2 Ethics |
| 02/18/20 | IPE | 06/10/20 | 85803 | 5 General, 1 Ethics |
| 02/24/20 | IPE | 06/16/20 | 85817 | 3 General |
| 02/24/20 | IPE | 06/17/20 | 85809 | 5 General, 1 Ethics |
| 02/25/20 | IPE | 05/05/20 | 85804 | 1 Ethics |
| 02/25/20 | IPE | 06/23/20 | 85807 | 3 General |
| 02/26/20 | IPE | 06/24/20 | 85810 | 5 General, 1 Ethics |
| 03/03/20 | IPE | 05/14/20 | 85811 | 1 General |
| 03/05/20 | IPE | 05/21/20 | 85812 | 1 General |
| 03/12/20 | IPE | 06/30/20 | 85821 | 6 General |
| 03/18/20 | IPE | 07/08/20 | 86100 | 6 General |
| 03/19/20 | IPE | 07/15/20 | 86133 | 5 General, 1 Ethics |
| 03/21/20 | IPE | 06/18/20 | 85813 | 1 General |
| 03/25/20 | IPE | 07/28/20 | 86104 | 2 Ethics |
| 04/01/20 | IPE | 07/21/20 | 86105 | 5 General, 1 Ethics |
| 04/02/20 | IPE | 07/23/20 | 86112 | 3 General |
| 04/08/20 | IPE | 06/29/20 | 85814 | 1 General |
| 04/08/20 | IPE | 08/06/20 | 86497 | 3 General |
| 04/09/20 | IPE | 08/27/20 | 86493 | 1 Ethics |
| 04/09/20 | IPE | 08/11/20 | 86569 | 3 General |
| 04/09/20 | IPE | 08/13/20 | 86543 | 3 General |
| 04/15/20 | IPE | 07/29/20 | 86138 | 5 General, 1 Ethics |
| 04/16/20 | IPE | 07/14/20 | 86101 | 1 General |
| 04/17/20 | IPE | 07/22/20 | 86102 | 1 General |
| 04/17/20 | IPE | 09/09/20 | 86570 | 3 General |
| 04/23/20 | IPE | 08/05/20 | 86572 | 5 General, 1 Ethics |
| 04/27/20 | IPE | 09/02/20 | 86422 | 5 General, 1 Ethics |
| 04/30/20 | IPE | 09/17/20 | 86552 | 3 General |
| 04/30/20 | IPE | 10/06/20 | 87782 | 1 Ethics |
| 05/01/20 | IPE | 10/07/20 | 87769 | 1 General |
| 05/01/20 | IPE | 08/12/20 | 86495 | 6 General |
| 05/01/20 | IPE | 10/08/20 | 87784 | 3 General |

| | | |
|--------------|----------|---------------------------|
| 05/07/20 IPE | 10/15/20 | 87770 3 General |
| 05/07/20 IPE | 09/11/20 | 86566 1 General |
| 05/14/20 IPE | 08/26/20 | 86573 5 General, 1 Ethics |
| 05/29/20 IPE | 08/04/20 | 86562 1 General |
| 06/03/20 IPE | 08/18/20 | 86568 1 General |
| 06/03/20 IPE | 09/16/20 | 86574 5 General, 1 Ethics |
| 06/05/20 IPE | 09/23/20 | 86575 5 General, 1 Ethics |
| 06/11/20 IPE | 09/29/20 | 86571 2 Ethics |
| 06/12/20 IPE | 09/30/20 | 86496 5 General, 1 Ethics |
| IPE | 10/14/20 | 87783 3 General |
| IPE | 09/15/20 | 86567 1 General |
| IPE | 10/22/20 | 87765 5 General, 1 Ethics |
| | | |
| | | |
| | | |

| Seminar Title |
|---|
| What Family Law Paralegal's Need to Know About Smartphone, Text and Social Media Evidence |
| Liens in Auto Injury for Paralegals |
| Strategies for the Personal Injury Paralegal: Plaintiff & Defense Perspectives |
| Litigation Boot Camp for Paralegals |
| Workers' Compensation Case Management: Top Challenges for Paralegals |
| Divorce Process, Forms and Checklists: What Every Paralegal Needs to Know |
| The Litigation Paralegals' Guide to Drafting Discovery Requests and Responses |
| Trust and Estate Administration for Paralegals |
| Social Media Evidence: A Paralegal's Guide |
| Medical Record Analysis for Paralegals: Chronologies, Summaries and Expense Itemizations |
| A Paralegal's Guide to Pleadings, Motions, Discovery Requests and Briefs |
| Administrative Mistakes Paralegals Need to Know to Avoid Ethics Nightmares |
| Top Mistakes in Estate Administration Accounting and Distributions: A Paralegal's Guide |
| Discovery Responses and Document Production: A Paralegal's Ultimate Guide |
| Ethics for Paralegals: Solutions to the Toughest Client Problems |
| Litigation for Paralegals: Top Challenges to Overcome |
| Essential Skills for the Corporate Paralegal |
| Advanced Family Law for Paralegals |
| Ethics of Email for Paralegals |
| Preparing for Trial: What Paralegals Need to Know |
| Wills and Trusts for Paralegals |
| LLC Formation in a Nutshell: What Paralegals Need to Know |
| Conducting the Title Search: A Paralegal's Toolkit |
| Legal Writing, Case Document Organization, and MS Word Guide for Paralegals |
| Handling the Divorce Case from Start to Finish: A Paralegal's Guide |
| Medicare Liens, Set-Asides, the Portal and Medicaid Liens: Everything Paralegals Need to Know |
| Paralegal How-To's: Smartphone and Text Evidence in Auto Injury |
| Paralegal Ethics: Avoiding Administrative Errors |
| Advanced Probate Administration for Paralegals |
| Efficient Discovery for Paralegals: Legal Hold, Document Production and More |
| A Paralegal's Playbook: Obtaining Evidence from Social Media and Other Internet Resources |
| The Paralegal's Guide to Medicaid, Medicare and Social Security |
| Ethical Implications of Technology: A Paralegals Guide |
| The Worker's Compensation Paralegal's Guide to Medical Records and Evidence |
| Litigation and Discovery Documents: Top Paralegal Mistakes |
| Medical Records for Paralegals: Advanced Issues and Answers |
| Discovery in Employment Litigation for Paralegals |
| M&A Closing Checklists and Documentation for Paralegals (with Samples) |
| A Paralegal's Guide to Personal Injury: Working with Medical Providers and Insurance |
| Motor Vehicle Accidents: A Crash Course for Paralegals |
| Paralegal's Guide to Family Law |
| A Paralegal's Guide to Aging Medical Chronologies |
| How to Avoid Unauthorized Practice of Law: A Paralegal's Guide |
| Medicare and Medicaid Liens: Changes Paralegals Need to Know |
| Mastering the Intangibles for Paralegals |
| Organizing SSDI Claims for Paralegals |

Criminal Law - Best Practices for Paralegals

Federal Court: E-Filing, Discovery and Other Case Management Tips for Paralegals

Land Use and Zoning for Paralegals

Secrets of Highly Successful Paralegals

Probate for Paralegals: Reading and Organizing Financial and Tax documents

An Investigator's Guide for Paralegals: How to Get the Info You Need

Probate and Estate Administration for Paralegals

Top 6 Ethical Mistakes Paralegals Make

Real Estate Boot Camp for Paralegals

Paralegal Skills: Finding Debtors and Their Assets

Paralegal's Guide to Bankruptcy - 2020 Update

Litigation Boot Camp for Paralegals

| Amount | Check Number | Deposited | Deposit Amt |
|----------|--------------|-------------|-------------|
| \$ 75.00 | 16335046 | 02/18/20 | |
| \$ 75.00 | 1636104 | 02/18/20 | |
| \$ 75.00 | 1636077 | 02/18/20 | |
| \$ 75.00 | 1636076 | 02/18/20 | Cancelled |
| \$ 75.00 | 1635855 | 02/18/20 | |
| \$ 75.00 | 1635801 | 02/18/20 | |
| \$ 75.00 | 1635800 | 02/18/20 | |
| \$ 75.00 | 1635691 | 02/18/20 | |
| \$ 75.00 | 1635573 | 02/18/20 | |
| \$ 75.00 | 1635478 | 02/18/20 | |
| \$ 75.00 | 1635304 | 02/18/20 | |
| \$ 75.00 | 1636425 | 02/18/20 | |
| \$ 75.00 | 1636426 | 02/18/20 | |
| \$ 75.00 | 1635692 | 02/18/20 | |
| \$ 75.00 | 1636840 | 03/03/20 | |
| \$ 75.00 | 1636879 | 03/03/20 | |
| \$ 75.00 | 1637280 | 03/03/20 | |
| \$ 75.00 | 1639279 | 03/03/20 | |
| \$ 75.00 | 163728 | 03/03/20 | |
| \$ 75.00 | 1637328 | 03/03/20 | |
| \$ 75.00 | 1636635 | 03/17/20 | |
| \$ 75.00 | 1637674 | 03/17/20 | |
| \$ 75.00 | 1637823 | 03/17/20 | |
| \$ 75.00 | 1638083 | 03/17/20 | |
| \$ 75.00 | rebroadcast | | 86325 |
| \$ 75.00 | 1638275 | 04/14/20 | |
| \$ 75.00 | 1638388 | 04/14/20 | |
| \$ 75.00 | 1636389 | 04/14/20 | |
| \$ 75.00 | 1638492 | 04/14/20 | |
| \$ 75.00 | 1638567 | 04/14/20 | |
| \$ 75.00 | 1638568 | 04/14/20 | |
| \$ 75.00 | 1638694 | 05/04/20 | |
| \$ 75.00 | 1638696 | 05/04/20 | |
| \$ 75.00 | 1638695 | 05/04/20 | |
| \$ 75.00 | 1638697 | 05/04/20 | |
| \$ 75.00 | 1638657 | 05/04/20 | |
| \$ 75.00 | 1638754 | 05/04/20 | |
| \$ 75.00 | 1638752 | 05/04/20 | |
| \$ 75.00 | 1638755 | 05/04/20 | |
| \$ 75.00 | 1638827 | rebroadcast | 84390 |
| \$ 75.00 | 1638828 | 05/12/20 | |
| \$ 75.00 | 1638910 | 05/12/20 | |
| \$ 75.00 | 1638911 | 05/12/20 | |
| \$ 75.00 | 1638912 | 05/12/20 | |
| \$ 75.00 | 1638913 | 05/12/20 | |
| \$ 75.00 | 1638914 | 05/12/20 | |

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|----|----------|---------|----------|
| \$ | 75.00 | 1638995 | 05/27/20 |
| \$ | 75.00 | 1638996 | 05/27/20 |
| \$ | 75.00 | 1639060 | 05/27/20 |
| \$ | 75.00 | 1639210 | 06/12/20 |
| \$ | 75.00 | 1639212 | 06/12/20 |
| \$ | 75.00 | 1639211 | 06/12/20 |
| \$ | 75.00 | 1639324 | 06/23/20 |
| \$ | 75.00 | 1639432 | 06/23/20 |
| \$ | 75.00 | 1639431 | 06/23/20 |
| \$ | 75.00 | | |
| \$ | 75.00 | | |
| \$ | 75.00 | | |
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| \$ | 4,350.00 | | |

| Approved | Provider | Date | Course # | Credits |
|----------|----------|----------|----------|---------------------|
| 01/02/20 | IPE | 04/15/20 | 85212 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 04/14/20 | 85217 | 1 General |
| 01/31/20 | IPE | 05/19/20 | 85806 | 3 General |
| 01/31/20 | IPE | 06/17/20 | 85025 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 05/12/20 | 85819 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 05/13/20 | 85815 | 3 General |
| 01/31/20 | IPE | 04/02/20 | 85216 | 1 General |
| 01/31/20 | IPE | 04/30/20 | 85202 | 5 General, 1 Ethics |
| 01/31/20 | IPE | 03/23/20 | 85207 | 1 General |
| 01/31/20 | IPE | 04/23/20 | 85206 | 3 General |
| 01/31/20 | IPE | 04/22/20 | 85204 | 5 General, 1 Ethics |
| 02/05/20 | IPE | 04/21/20 | 85220 | 1 Ethics |
| 02/06/20 | IPE | 05/27/20 | 85802 | 5 General, 1 Ethics |
| 01/14/20 | IPE | 05/06/20 | 85808 | 5 General, 1 Ethics |
| 02/18/20 | IPE | 04/23/20 | 85818 | 2 Ethics |
| 02/18/20 | IPE | 06/10/20 | 85803 | 5 General, 1 Ethics |
| 02/24/20 | IPE | 06/16/20 | 85817 | 3 General |
| 02/24/20 | IPE | 06/17/20 | 85809 | 5 General, 1 Ethics |
| 02/25/20 | IPE | 05/05/20 | 85804 | 1 Ethics |
| 02/25/20 | IPE | 06/23/20 | 85807 | 3 General |
| 02/26/20 | IPE | 06/24/20 | 85810 | 5 General, 1 Ethics |
| 03/03/20 | IPE | 05/14/20 | 85811 | 1 General |
| 03/05/20 | IPE | 05/21/20 | 85812 | 1 General |
| 03/12/20 | IPE | 06/30/20 | 85821 | 6 General |
| 03/18/20 | IPE | 07/08/20 | 86100 | 6 General |
| 03/19/20 | IPE | 07/15/20 | 86133 | 5 General, 1 Ethics |
| 03/21/20 | IPE | 06/18/20 | 85813 | 1 General |
| 03/25/20 | IPE | 07/28/20 | 86104 | 2 Ethics |
| 04/01/20 | IPE | 07/21/20 | 86105 | 5 General, 1 Ethics |
| 04/02/20 | IPE | 07/23/20 | 86112 | 3 General |
| 04/08/20 | IPE | 06/29/20 | 85814 | 1 General |
| 04/08/20 | IPE | 08/06/20 | 86497 | 3 General |
| 04/09/20 | IPE | 08/27/20 | 86493 | 1 Ethics |
| 04/09/20 | IPE | 08/11/20 | 86569 | 3 General |
| 04/09/20 | IPE | 08/13/20 | 86543 | 3 General |
| 04/15/20 | IPE | 07/29/20 | 86138 | 5 General, 1 Ethics |
| 04/16/20 | IPE | 07/14/20 | 86101 | 1 General |
| 04/17/20 | IPE | 07/22/20 | 86102 | 1 General |
| 04/17/20 | IPE | 09/09/20 | 86570 | 3 General |
| 04/23/20 | IPE | 08/05/20 | 86572 | 5 General, 1 Ethics |
| 04/27/20 | IPE | 09/02/20 | 86422 | 5 General, 1 Ethics |
| 04/30/20 | IPE | 09/17/20 | 86552 | 3 General |
| 04/30/20 | IPE | 10/06/20 | 87782 | 1 Ethics |
| 05/01/20 | IPE | 10/07/20 | 87769 | 1 General |
| 05/01/20 | IPE | 08/12/20 | 86495 | 6 General |
| 05/01/20 | IPE | 10/08/20 | 87784 | 3 General |

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| 05/07/20 IPE | 10/15/20 | 87770 3 General |
| 05/07/20 IPE | 09/11/20 | 86566 1 General |
| 05/14/20 IPE | 08/26/20 | 86573 5 General, 1 Ethics |
| 05/29/20 IPE | 08/04/20 | 86562 1 General |
| 06/03/20 IPE | 08/18/20 | 86568 1 General |
| 06/03/20 IPE | 09/16/20 | 86574 5 General, 1 Ethics |
| 06/05/20 IPE | 09/23/20 | 86575 5 General, 1 Ethics |
| 06/11/20 IPE | 09/29/20 | 86571 2 Ethics |
| 06/12/20 IPE | 09/30/20 | 86496 5 General, 1 Ethics |
| IPE | 10/14/20 | 87783 3 General |
| IPE | 09/15/20 | 86567 1 General |
| IPE | 10/22/20 | 87765 5 General, 1 Ethics |
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Seminar Title

What Family Law Paralegal's Need to Know About Smartphone, Text and Social Media Evidence

Liens in Auto Injury for Paralegals

Strategies for the Personal Injury Paralegal: Plaintiff & Defense Perspectives

Litigation Boot Camp for Paralegals

Workers' Compensation Case Management: Top Challenges for Paralegals

Divorce Process, Forms and Checklists: What Every Paralegal Needs to Know

The Litigation Paralegals' Guide to Drafting Discovery Requests and Responses

Trust and Estate Administration for Paralegals

Social Media Evidence: A Paralegal's Guide

Medical Record Analysis for Paralegals: Chronologies, Summaries and Expense Itemizations

A Paralegal's Guide to Pleadings, Motions, Discovery Requests and Briefs

Administrative Mistakes Paralegals Need to Know to Avoid Ethics Nightmares

Top Mistakes in Estate Administration Accounting and Distributions: A Paralegal's Guide

Discovery Responses and Document Production: A Paralegal's Ultimate Guide

Ethics for Paralegals: Solutions to the Toughest Client Problems

Litigation for Paralegals: Top Challenges to Overcome

Essential Skills for the Corporate Paralegal

Advanced Family Law for Paralegals

Ethics of Email for Paralegals

Preparing for Trial: What Paralegals Need to Know

Wills and Trusts for Paralegals

LLC Formation in a Nutshell: What Paralegals Need to Know

Conducting the Title Search: A Paralegal's Toolkit

Legal Writing, Case Document Organization, and MS Word Guide for Paralegals

Handling the Divorce Case from Start to Finish: A Paralegal's Guide

Medicare Liens, Set-Asides, the Portal and Medicaid Liens: Everything Paralegals Need to Know

Paralegal How-To's: Smartphone and Text Evidence in Auto Injury

Paralegal Ethics: Avoiding Administrative Errors

Advanced Probate Administration for Paralegals

Efficient Discovery for Paralegals: Legal Hold, Document Production and More

A Paralegal's Playbook: Obtaining Evidence from Social Media and Other Internet Resources

The Paralegal's Guide to Medicaid, Medicare and Social Security

Ethical Implications of Technology: A Paralegals Guide

The Worker's Compensation Paralegal's Guide to Medical Records and Evidence

Litigation and Discovery Documents: Top Paralegal Mistakes

Medical Records for Paralegals: Advanced Issues and Answers

Discovery in Employment Litigation for Paralegals

M&A Closing Checklists and Documentation for Paralegals (with Samples)

A Paralegal's Guide to Personal Injury: Working with Medical Providers and Insurance

Motor Vehicle Accidents: A Crash Course for Paralegals

Paralegal's Guide to Family Law

A Paralegal's Guide to Aging Medical Chronologies

How to Avoid Unauthorized Practice of Law: A Paralegal's Guide

Medicare and Medicaid Liens: Changes Paralegals Need to Know

Mastering the Intangibles for Paralegals

Organizing SSDI Claims for Paralegals

Criminal Law - Best Practices for Paralegals

Federal Court: E-Filing, Discovery and Other Case Management Tips for Paralegals

Land Use and Zoning for Paralegals

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| \$ | 4,350.00 | | |

PARALEGAL DIVISION

JUNE 27, 2020 BOARD MEETING

COMMITTEE TITLE: CLE TRACKING

COMMITTEE CHAIR: EMMALEE ATENCIO

COMMITTEE MEMBER: KAY HOMAN

DATE OF MEETING: JUNE, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Communicated with PD members regarding recording 2020 CLE hours
- Communicated with division administrative assistant regarding tracking 2020 CLE hours for division members
- Moved for easing restriction on self-study credits for 2020 in light of ongoing cancellations of CLEs caused by COVID-19 and contacted the membership to notify of the change for 2020

PARALEGAL DIVISION

COMMITTEE TITLE: **Membership**

COMMITTEE: **Angela Minefee and Kathy Campbell (Co-Chairs)**
 Kay Homan (Member)

DATE OF REPORT: **June 27, 2020**

2020 Membership Activity Since March Report:

- 7 members have been approved to date in 2020 (see below)
- 1 member (Freya Tschantz) was disenrolled on March 31 for 2019 MCLE noncompliance.

The following members have been approved thus far in 2020:

Sarah Archuleta, Taos – approved February 11
Lorraine Chavez, Albuquerque – approved January 8
Vanessa Griego, Albuquerque – approved March 20
Ariel Murray, Las Cruces – approved June 2
Pamela Stuchly, Albuquerque – approved January 8
Devany Whipple, Las Cruces – approved January 6
Desiree Maynard, Lovington – approved March 13

We currently have 124 active members and 11 inactive.

The membership roster was submitted to the State Bar on April 22 for publication in the 2020-2021 *Bench & Bar Directory*.

**PARALEGAL DIVISION
BOARD MEETING
June 27, 2020**

COMMITTEE: Pro-Bono/ Community Service Committee Report

COMMITTEE CHAIR: Linda Sanders

DATE OF MEETING: June 27, 2020

ONGOING ACTIVITIES:

Unfortunately, due to the current health crisis, all events are cancelled for the foreseeable future. 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

JUNE 27, 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: JUNE 27, 2020

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Commemorative Gift for Charter members and members who have been enrolled for at least 20 years ordered and delivered
- Gift for membership ordered, in process of mock-up review
- Discussed possibility of having Zoom Happy Hours in lieu of in person events due to COVID-19