



**ANNUAL MEETING**  
AT THE STATE BAR OF NEW MEXICO  
SATURDAY, JANUARY 5, 2019

**AGENDA**  
(Revised March 8, 2019)

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

- |             |   |                     |
|-------------|---|---------------------|
| <b>I.</b>   | <b>Approval of the Minutes from January 6, 2018</b> | Minutes Attached    |
| <b>II.</b>  | <b>Officer Reports</b>                              |                     |
|             | Chair   | Christina Babcock   |
|             | Chair-Elect   | Lynette Rocheleau   |
|             | Immediate Past Chair                                | Barbara C. Lucero   |
|             | Secretary   | Yolanda Ortega      |
|             | Treasurer   | Tina Kelbe          |
|             |   | Report              |
|             |   | Report              |
|             |   | No Report           |
|             |   | Minutes Attached    |
|             |   | Report              |
| <b>III.</b> | <b>Standing Committee Reports</b>                   |                     |
|             | Budget & Finance                                    | Tina Kelbe          |
|             | Bylaws  | Kay Homan           |
|             | ENews/Web Page                                      | Debbie Tope         |
|             |   | & Amy Meilander     |
|             | CLE-Coordination                                    | Lynette Rocheleau   |
|             |   | & Yolanda Hernandez |
|             | CLE-Provider Approvals                              | Tina Kelbe          |
|             | CLE-Tracking  | Kay Homan           |
|             | Nominating & Elections                              | Ruby Silva          |
|             | Events  | Barbara Lucero      |
|             | Membership  | Kathleen Campbell   |
|             |   | & Lynette Rocheleau |
|             | Pro Bono/Community Service                          | Amy Meilander       |
|             | Professional Development                            | Emmalee Atencio     |
|             |   | & Ruby Silva        |
|             | Scholarship   | Nettie Condit       |
|             |   | Report Attached     |
|             |   | Report Attached     |
|             |   | Report Attached     |
|             |   | Report Attached     |
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|             |   | Report Attached     |
|             |   | Report Attached     |
|             |   | Report Attached     |

**IV. State Bar Committee Reports**

**V. Old Business**

A.

**VI. New Business**

A.

**VII. Adjournment at \_\_\_\_\_**

**PARALEGAL DIVISION  
ANNUAL REPORT  
January 5, 2019**

**CHAIR REPORT**

**CHAIR** Christina Babcock

**DATE OF REPORT** January 5, 2019

**Board of Bar Commissioners (BBC) Activities:**

- I attended all BBC meetings this year as the Paralegal Liaison and presented a report each time on what the division is working on.
  - February 2, 2018 at the State Bar, I was also sworn in by Justice Chief Nakamura.
  - May 18, 2018 at the State Bar.
  - August 9, 2018 at the Annual Meeting at the Tamaya Resort and Spa in Bernalillo.
  - October 12, 2108 at the State Bar.
  - December 13, 2018 at the NM Supreme Court. I also attended the swearing-in and reception following the final December meeting.
- I served on the BBC awards committee.
- Attended the Albuquerque Bar Association Law Day Luncheon with the BBC in April.
- Attended the new Bar Commissioner Orientation in May.
- Attended the Past Presidents Dinner at the Annual Meeting.
- Attended the State Bar Christmas party at Nick and Jimmy's

**Paralegal Division Activities:**

- Attended all Paralegal Division Board Meetings with the exception of May, due to a death in the family.
- Hosted the Paralegal day luncheon at Pappadeaux Sea Food Kitchen to celebrate Paralegal Day.
- Attended the State Bar Annual Meeting at the Tamaya.
- Hosted the Annual Meeting Paralegal Division luncheon at the Tamaya.
- Attended the CLE Institute co-sponsored by the Paralegal Division and hosted the holiday dinner immediately after at Tomasita's.
- Emailed each new member individually to welcome them to the division and let them know to contact me if they have any questions. I also included information about joining a committee.
- Emailed all division members about sending their CLE information to Kay, the Paralegal Day luncheon, the Annual Conference luncheon, the Institute CLE, and the holiday dinner.
- I appointed Emmalee to serve on the Limited Licensed Legal Technician (LLLT) commission.

- I addressed numerous emails and phone calls regarding membership, CLEs, job postings, and questions in general about the division.
- I forwarded numerous emails to Kay regarding CLE credits, Debbie regarding job postings, and Kathy regarding membership.
- Communicated with various division committees throughout the year.

I enjoyed my time as chair and was honored to have served. Thank you all for your support. I look forward to assisting Lynette in any way I can in 2019.

**PARALEGAL DIVISION  
BOARD MEETING  
September 8, 2018**

**ANNUAL CHAIR-ELECT REPORT**

**CHAIR-ELECT**                      Lynette Rocheleau

**DATE OF REPORT**              January 5, 2019

During the year I have done the following:

- Met with Christina Babcock to discuss the position of Chair Elect
  - Received materials related to position
- Responded to emails from members and potential members
  - As Co-Chair of the Membership committee, sent emails to new members
- Acted as Chair for Christina for one of the PD meetings she was unable to attend
- Attended the luncheon at the 2018 State Bar Convention
- Attended the annual luncheon for Paralegal Day
- Was Co-Chair of the CLE Committee
- Hosted the annual Institute CLE in November
  - Attended the Paralegal Division dinner afterward

**PARALEGAL DIVISION  
TREASURER'S REPORT  
ANNUAL MEETING  
JANUARY 5, 2019**

**Date of Report: January 14, 2019**

Activities Undertaken in 2018:

The Treasurer has performed the routine duties of the office this year which include timely and accurate payment of invoices, reimbursing members for expenses, depositing income checks, balancing the bank account and reporting to the Board periodically as to the status of the funds in the Division's bank account.

The State Bar's accounting system "intacct" allows us 24/7 on-line access for the Division's Treasurer to view and monitor deposits, check requests and current balances for our account. We continue to receive timely invoices for State Bar Administrative expenses incurred on behalf of the Division. Attached is the year-end 2018 Budget Report. As reflected on the Report, our financial position remains strong: We projected the year-end balance at \$37,429.09. The year-end adjusted balance through December 31, 2018, is \$57,022.69. We continue to exceed our projection as a result of additional fees collected in 2018 for membership, the April 3 hr Law Day CLE, the Sept. 3 hr. CLE and the CLE Provider(s) Approval requests.

Respectfully Submitted,

Tina L. Kelbe, CP  
Treasurer

PARALEGAL DIVISION OF STATE BAR OF NEW MEXICO						
2018 Proposed Budget – Approval pending		2018 Budget	12/31/18			
Operating Reserve Beginning of Year		56,288.51			Status	
<b>INCOME</b>						
4000- Membership Dues		9,000.00	10,610.00		118%	
4300-Interest Earned		100.00	85.10		85%	
4805-Seminar Approval Fees		1,500.00	6,600.00		440%	
4805-Seminars		1,000.00	1,895.00		190%	
Akbuquerque - \$900.00						\$190 pending +\$80
4900-Miscellaneous Income						
<b>TOTAL INCOME</b>		<b>11,600.00</b>	<b>19,190.10</b>		<b>165%</b>	
<b>EXPENSES</b>						
Overhead						
5250-Contract Labor		4,000.00	3,873.37		97%	
6110-State Bar Administrative Fees		1,000.00	1,042.60		104%	
6210-Printing & photocopies		150.00			0%	
6230-Office Supplies		150.00			0%	
6230-Gifts for Members/Member Benefits		5,000.00	4,175.05		84%	
6270-Postage		100.00			0%	
6140 - Contributions to State Bar Annual Mtg		5,000.00	5,000.00		100%	
6140 – Contributions – State Bar Silent Auction		500.00	500.00		100%	
6140 – Contributions – Miscellaneous		500.00			0%	
<b>Communications</b>						
6160-Receptions/Meetings		5,000.00	2,806.40		56%	
6310-Travel Expenses		250.00	267.29		107%	
<b>Continuing Legal Education</b>						
6741 - Seminars		7,500.00	791.21		11%	
6751 - Regional Scholarships		1,000.00			0%	
6995-Miscellaneous Expenses		150.00			0%	





**STATE BAR OF NEW MEXICO PARALEGAL DIVISION  
ANNUAL MEETING REPORT  
BYLAWS COMMITTEE  
COMMITTEE CHAIR: Kay L. Homan, CP**

**COMMITTEE MEMBERS:** Nettie Condit, Ruby Silva, Carolyn Whitton, Rowan Williams

**DATE OF MEETING:** January 5, 2019

**ACTIVITIES UNDERTAKEN:**

**ONGOING ACTIVITIES:**

There is no reason at this time to amend the Division Bylaws.

The Committee is reviewing the Standing Rules to provide information and recommendations regarding changes to the Standing Rules. Once the Committee has reviewed the Standing Rules, the recommended changes will be presented to the Board for its approval.

Some recommended changes include: (1) clarification of duties of officers to conform to current practices; (2) clarification and simplification of duties of committees; and (3) clarification election guidelines. Also recommend eliminating attachment of forms as they are fluid and are posted on the website.

**ISSUES REQUIRING ACTION:** None

**ATTACHEMENTS:** None

## **PARALEGAL DIVISION**

### **ANNUAL REPORT**

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

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

**DATE OF ANNUAL REPORT:** January 5, 2019

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

[http://www.nmbar.org/Nmstatebar/About Us/Paralegal Division/Paralegal Division.aspx?WebsiteKey=687d8cd9-4ff9-4f83-a12f-6657211dab17&hkey=7fea2437-2fa2-4acd-bef2-6d8e1d012f43&New\\_ContentCollectionOrganizerCommon=1#New\\_ContentCollectionOrganizerCommon](http://www.nmbar.org/Nmstatebar/About%20Us/Paralegal%20Division/Paralegal%20Division.aspx?WebsiteKey=687d8cd9-4ff9-4f83-a12f-6657211dab17&hkey=7fea2437-2fa2-4acd-bef2-6d8e1d012f43&New_ContentCollectionOrganizerCommon=1#New_ContentCollectionOrganizerCommon).

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

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

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

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

During the membership renewal period, starting in mid-November, a link is added to the Division's home page with the renewal form. The deadline for submitting membership renewals this year is January 15, 2019. When the renewal period is over, the link to the renewal form is removed from the home page to avoid confusion among forms.

The schedule of events for 2019 has been posted on the web page. Updates to the Officers & Directors and committee chairs will be made shortly before or immediately after the Annual Meeting. Information on any CLE programs scheduled will be posted as they become available.

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

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

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

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

**Deborah Tope**  
**Amy Meilander**  
Web Page/ENews Committee

**PARALEGAL DIVISION  
ANNUAL MEETING**

**CLE REPORT**

**COMMITTEE:** Lynette Rocheleau and Yolanda Hernandez (Co-Chairs)

**DATE OF REPORT:** January 5, 2019

**ACTIVITIES UNDRTAKEN SINCE LAST REPORT:**

The Committee coordinated the CLE's for September and November 2018.

**September CLE**

- We had three Attorneys speak on trial preparation as a group instead of individually.
- This CLE was approved by the Board to be webcast, as a test case for possible future half day CLE webcasts.
  - There was a problem with the webcast in which it was down for approximately 15 minutes
  - The charge was \$50 per hour with a mandatory 1 hour setup charge
    - All attendees would pay the same no matter whether they were in person or on webcast
- I believe we had approximately 30 attendees with 7 or 8 on webcast

**November CLE**

- We worked with Morgan at the State Bar to coordinate the December CLE.
- The CLE was a mixed bag of different topics including an ethics presentation
- I believe we had a total of 73 attendees, both in person and webcast.

**COMMENTS:**

- According to David Newquist (webcasting for CLE) the State Bar has rewired the auditorium so there shouldn't be a problem in the future with the loss of webcast. The November one went off without a hitch.

**CLE PROVIDER(S) APPROVALS COMMITTEE  
ANNUAL MEETING  
January 5, 2019**

**COMMITTEE TITLE: CLE PROVIDER(S) APPROVALS**

**COMMITTEE CHAIR: TINA L. KELBE**

**COMMITTEE MEMBERS: KAY HOMAN AND PATRICIA MARSH**

**DATE OF REPORT: January 2, 2019**

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- ☐ Received and reviewed CLE provider approval requests
- ☐ Total collected January 1, 2018 – December 27, 2018 \$6,975
- ☐ E-mails from and to Members re seminar approvals

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION  
ANNUAL COMMITTEE REPORT  
AND COMMITTEE BOARD REPORT**

**COMMITTEE TITLE:** CLE Tracking Committee

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

**COMMITTEE MEMBERS:**

**DATE OF MEETING:** Annual Meeting and Board Meeting – January 5, 2019

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

I took over the CLE Tracking Committee in May of 2018 and have continued the practice of reporting updated CLE credits as they are reported to me.

**ONGOING ACTIVITIES:**

Beginning with the September/October 2018 issue of Facts and Findings, NALA will give one hour of CLE credit for reading five designated articles in a single issue and successfully completing a follow-up test on those articles. Must get 80% correct answers to get credit. Up to two hours of CLE will be available per year.

**ISSUES REQUIRING BOARD ACTION:** Address the new NALA opportunities for obtaining CLE credit with the consideration of giving credit to Division Members.

**ATTACHEMENTS:** None

**COMMENTS:** I will continue as CLE Tracking Chair in 2019 if that is the Board's desire.

## **PARALEGAL DIVISION**

### **2018 ANNUAL COMMITTEE REPORT**

**COMMITTEE TITLE:** **NOMINATING AND ELECTIONS**

**COMMITTEE CHAIR:** **RUBY SILVA**

**COMMITTEE MEMBER:** **NETTIE CONDIT**

**DATE OF MEETING:** **January 5, 2019**

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

The deadline for submitting Declaration of Candidacy Forms for the 2019 Elections was October 15, 2018. The Election Committee received the following Declaration of Candidacy Forms by the deadline:

- Chair Elect – Yolanda K. Hernandez
- Treasurer – Angela Minefee
- Director – Nettie Condit
- Director – Linda Sanders
- Director – Logan Sierra Rhoten

Ruby Silva and Pam Zimmer of the State Bar discussed the elections in various emails.

The following criteria was followed by the Election Committee:

- Starting the Elections no later than November 5<sup>th</sup>
- Setting up reminders to go out to the Members that have not voted
- Testing the election system to make sure the online election process works correctly
- Setting up the elections so people could choose not to vote for someone
- Ensuring that the write-in feature worked
- Names appeared in random order on the ballot, so no one person had an advantage

On November 2, 2018, the State Bar sent out the Committee's letter to the Members with the link to the voting site. The deadline for voting was November 21, 2018. Several reminders were sent to the Members that had not cast their votes. The reminders were sent out by Online Elections. This reminder goes only to the Members that have not voted, so Members who had already voted were not bothered with unnecessary emails to vote.

The Committee monitored the number of votes received during the Election process to ensure the Division had the necessary votes for a valid election, which is forty percent (40%). In this election fifty-five percent (55%) of the members voted.

**ONGOING ACTIVITIES:**

None

**ISSUES REQUIRING BOARD ACTION:**

None

**ATTACHMENTS:**

Certification of the 2019 Election.

**COMMENTS:**

None



**STATE BAR OF NEW MEXICO  
PARALEGAL DIVISION  
NOMINATING AND ELECTIONS COMMITTEE  
CERTIFICATION OF 2019 ELECTIONS**

I, Ruby Silva, as Chair of the Nominating and Elections Committee of the Paralegal Division, do hereby certify the following results for the 2019 Elections.

POSITION	CANDIDATE	NO. OF VOTES
Chair-Elect	Yolanda Hernandez	72
Secretary	Position vacant	
Treasurer	Angela Minefee	76
Board Member	Nettie Condit	68
Board Member	Linda Sanders	74
Board Member	Logan Sierra Rhoten	74

I further certify that there were 76 ballots received by the deadline for voting.

No one ran for the position of secretary. The following write in votes for Secretary were received:

Amy Meilander - Received 1 vote  
Angelique Wall - Received 1 vote  
Carolyn Winton - Received 1 vote  
Dora Paz - Received 1 vote  
Yolanda Ortega - Received 2 votes

The following write in vote for Director was received:

Debbie Tope 1 vote.

Signed this 1<sup>st</sup> day of December 2018

*Ruby Silva*

Ruby Silva, Chair  
Nominating and Elections Committee



## Results for Paralegal Division 2019

Total ballots returned = 77

Total number of eligible voters = 140

Percent of ballot return = 55.00%

### Office of Chair-Elect

Yolanda K. Hernandez - Received 72 votes, 93.51% of the total.

Made no selection - Received 5 votes, 6.49% of the total.

### Office of Treasurer

Angela Minefee - Received 76 votes, 98.70% of the total.

Made no selection - Received 1 votes, 1.30% of the total.

### Office of Secretary

Made no selection - Received 71 votes, 92.2% of the total.

Amy Meilander - Received 1 votes, 1.30% of the total.

Angelique Wall - Received 1 votes, 1.30% of the total.

Carolyn Winton - Received 1 votes, 1.30% of the total.

Dora Paz - Received 1 votes, 1.30% of the total.

Yolanda Ortega - Received 2 votes, 2.60% of the total.

### Board of Directors

Linda Sanders - Received 74 votes, 96.10% of the total.

Logan Sierra Rhoten - Received 74 votes, 96.10% of the total.

Nettie Condit - Received 68 votes, 88.31% of the total.

Debbie Tope - Received 1 votes, 1.30% of the total.

**PARALEGAL DIVISION**  
**Board of Directors Annual Meeting**  
**January 5, 2019**

**EVENTS COMMITTEE REPORT**

**COMMITTEE CHAIR:** Barbara C. Lucero, CP

**COMMITTEE MEMBER:** None

**DATE OF REPORT:** January 3, 2019

Below is the annual report for the Events Committee.

The committee organized the following events during the 2018 calendar year:

- Lunch at the State Bar of New Mexico ("SBNM") for our annual meeting on January 6th.
- Dinner at our regular called board meeting at the SBNM on March 17th.
- Refreshments and lunch for our regular called board meeting at the Cuddy & McCarthy Law Firm in Santa Fe on May 12th.
- Lunch at Pappadeaux Seafood Kitchen in Albuquerque to celebrate Paralegal Day on August 25th.
- Refreshments and lunch at our regular called board meeting at the SBNM on September 8th.
- Dinner at Tomasita's Restaurant in Albuquerque to celebrate the holidays with our Division members on November 30th.

The committee also organized the refreshments and lunch at the SBNM for the January 5, 2018 2018 annual meeting and 2019 regular called board meeting.

Please let me know if you have questions.

Thank you.

**PARALEGAL DIVISION**  
**ANNUAL COMMITTEE REPORT**

**COMMITTEE TITLE:** Membership

**COMMITTEE:** Lynette Rocheleau and Kathy Campbell (Co-Chairs); Kay Homan

**DATE OF REPORT:** January 5, 2019

**2018 Membership Activity:**

- We started the year with 129 active members and 16 inactives. We lost 15 actives to nonrenewal (13) and inactive status (2) leaving 114 active members after the 2018 renewal cycle. One active member and one inactive are now deceased. See **In Memoriam** below.
- Four of 16 inactives did not renew.
- We approved 31 new members during the year (14 of these were approved in July alone due to the new requirement of the Risk Management Division of the State of New Mexico that requires paralegals providing services to attorneys contracting with the RMD to be members of the Division).
- We ended the year with 144 active members and 11 inactives.

**IN MEMORIAM**

**Carol S. Wood**, a charter member of the Division, passed away on August 3, 2018, after a two and a half-year battle with pancreatic cancer. Carol was a resident of Albuquerque and most recently was employed as a paralegal for the firm of German • Burnette & Associates LLC. Carol was part of a group of several working paralegals who came together in 1989 with the goal of raising standards for the profession in New Mexico by creating a State Bar of New Mexico Legal Assistants Division (later re-named Paralegal Division). Carol will be remembered for her soft-spoken manner, warm smile, and devotion to her family and friends. The Division is grateful for her contribution to and support of both the paralegal profession and the Division.

**Linda C. Stocky**, a long-time member of the Division, former Division Chair and Certified Paralegal, passed away on September 27, 2018, after a short battle with cancer. Linda worked as a paralegal in Santa Fe for many years before returning to her home state of Tennessee. She retired after several years of working as a paralegal in Tullahoma; and she and her husband George became active members of the community, joining an RV group that traveled together making many fond memories. During her tenure as Chair of the Division in 2003, Linda spear-headed the Name Change Committee which was successful in renaming the Division from Legal Assistants Division to Paralegal Division in recognition of the professional distinction between the terms "legal assistant" and "paralegal." She also served on numerous committees while both an active and inactive member of the Division. Linda was an astute business woman, excellent paralegal, ardent supporter of the profession, and a cherished friend who will be greatly missed by her close Division colleagues and friends.

## **PARALEGAL DIVISION**

### **ANNUAL REPORT**

**COMMITTEE TITLE:** Pro Bono/Community Service  
**COMMITTEE:** Amy Meilander and Linda Sanders  
**DATE OF REPORT:** January 5, 2019

During the January 2018 board meeting, I volunteered to chair the Pro Bono/Community Service Committee. The committee's goal is to ensure that members of the paralegal community know of the many pro bono events sponsored throughout the state of New Mexico.

Pro bono event sponsors from the State Bar of New Mexico were contacted (Aja Brooks, New Mexico Legal Aid, and the Pro Bono Coordinator for the Volunteer Attorney Program; and Sonia Russo from the Young Lawyers Division of the NM State Bar, who put me in contact with Sean Fitzpatrick (Wills for Warriors and VA Clinics) and Kaitlyn Luck (Homeless Clinics)

All the sponsors were in agreement that they wanted links to their flyers and/or web pages from our web page. They also wanted the paralegals to contact them directly to sign-up for the events.

The web page was designed and listings were created for 2018 events. The sponsors were contacted and they reviewed the web page. The list started with 38 events and ended the year having advertised over 60 pro bono events throughout the state.

In March, paralegal division members received an email introducing them to the new web page of pro bono events web page; reminding them that CLE credits may be earned and directing them to the instructions on the Paralegal Division web page; and asking them for information on additional pro bono events around the state.

I attended the State Bar of New Mexico Annual Meeting and made it a point to meet with Sean Fitzpatrick, 2018 YLD Chair; Sonia Russo, YLD Chair-elect, and Billy Jimenez, Director-at-Large, Position 5. All had positive comments about the paralegal participation throughout the year and were very supportive of the web page.

Two paralegal division members volunteered to be a part of the Pro Bono/Community Services Committee - Rowan Williams and Linda Sanders. Our first meeting was a teleconference in September. The Committee decided to send a monthly email to Paralegal Division members announcing the next month's pro bono events to encourage participation and familiarize members with the Pro Bono Events web page. Along with listing the next month's events, the monthly email reminds members that they can earn CLE credits by in pro bono events; directs them to the instructions on the Paralegal Division web pages; and requests information on additional pro bono events around the state. The monthly email messages began in August and continue to be distributed each month.

Both committee members took very active roles, reviewing Bar Bulletins and keeping their eyes open for any additional pro bono events. This led to the Immigration Law event and an event at the IP Clinic event at UNM. They also sent out the monthly emails to division members. My thanks to Rowan and Linda. [Note: Rowan has taken a job in Washington D.C. and is no longer with the division.]

Throughout the year, more events were reported to the committee and were added to the webpage as soon as we received the information. Any email questions from sponsors or division members were answered and questions concerning CLE credits were sent to the CLE Committee.

Part-way through the year, flyers were distributed in both English and Spanish and members were encouraged, even though they would not be volunteering for the event, to post the flyers.

October was Pro Bono month. The committee received an additional 10 events in September and October to post on the website. The events were held in Aztec, Deming, Taos, Clovis, Las Cruces, and Alamogordo, as well as Santa Fe and Albuquerque.

A final count of how many division members attended pro bono events will not be available until the end of January. At that time, a report will be emailed to the board and a special email thanking our 2018 volunteers will be sent to our members.

For 2019, the committee will continue to keep in contact with sponsors, post new events, and continue the monthly pro bono opportunities email. The committee will also continue to reach out to other organizations for additional events.

**ISSUES REQUIRING BOARD ACTION: Paralegal Division sponsoring a pro bono event (Linda Sanders to lead discussion)**

**PARALEGAL DIVISION**

**JANUARY 5, 2019 ANNUAL BOARD MEETING**

**COMMITTEE TITLE:** PROFESSIONAL DEVELOPMENT  
**COMMITTEE CHAIR:** EMMALEE ATENCIO, RUBY SILVA  
**COMMITTEE MEMBER:** ROWAN WILLIAMS  
**DATE OF MEETING:** JANUARY 5, 2019

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

No additional activities since last report. Rowan Williams added as member to committee in April 2018.

**PARALEGAL DIVISION**

**COMMITTEE TITLE:** Scholarship Committee Annual Report

**COMMITTEE CHAIR:** NETTIE CONDIT

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

**DATE OF MEETING:** January 5, 2019

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

**In early September, the Scholarship Flyer was emailed to CNM, Dona Ana Community College and Santa Fe Community College. The deadline for applications was November 1, 2017. THERE WERE NO RESPONSES.**

**ONGOING ACTIVITIES:** None

**ISSUES REQUIRING BOARD ACTION:**

None at the present.

**ATTACHMENTS:**

None

**COMMENTS:**



MINUTES AS APPROVED FROM PRIOR PD MEETING  
WITH REPORTS AS AVAILABLE

**NEW MEXICO STATE BAR  
PARALEGAL DIVISION ANNUAL MEETING  
JANUARY 6, 2018**

The annual meeting of the State Bar of New Mexico Paralegal Division ("Division") was held on Saturday, January 6, 2018, at the State Bar of New Mexico, Albuquerque, New Mexico.

**CALL TO ORDER:** The meeting was called to order by Chair, Barbara Lucero at 11:18 a.m.

**Attendees were:**

Barbara Lucero, CP, Chair	Christina Babcock, Chair-Elect -	Kay Homan, CP, Secretary
Tina Kelbe, Treasurer	Yolanda Hernandez, Director	Amy Meilander, Director
Lynette Rocheleau, Director	Nettie Condit, Director/Scholarship	Ruby Silva, Elections Chair
Debbie Tope, Web Page Chair	Kathy Campbell, Administrator	Emmalee Atencio, Director Elect
Dorothy J. Murphy, Director Elect		

**I. Approval of Minutes** – No minutes to approve.

**II. Officer Reports.**

**Chair** – Report attached. Barbara Lucero reported on her activities serving on the Board of Bar Commissioners and as Chair of the Division. Barbara expressed her pleasure serving as the Chair for 2017 and looks forward to assisting Christina as Immediate Past Chair.

**Chair-Elect** – Report attached. Christina Babcock reported that most of her time was serving as Co-Chair of the CLE Committee. She further reported that she been in contact with the BBC about her role and future meetings.

**Immediate Past Chair** – No report.

**Secretary** – No Report.

**Treasurer** – Report attached. Tina Kelbe reported that the State Bar's new accounting system "intact" allows treasurer 24/7 on-line access to monitor activities in our account. The projected year-end balance is approximately \$49,379.09.

**III. Standing Committee Reports**

**Budget & Finance** – See Treasurer's Report.

**Bylaws** – No Report.

Communications (ENews/Web Page) – Report attached. Debbie Tope and Amy Meilander provided a very detailed report of the activities and updates on the web page.

CLE Coordination – Report attached. Christina Babcock reported that we had less than 20 attendees at the September CLE and had 60 registrants at the December CLE. She noted that we need a chair or co-chairs for the committee for 2018.

CLE Provider Approvals – Report attached. Tina Kelbe reported that the total collected January 1, 2017 – December 31, 2017 was \$6,625.00

CLE Tracking – Report attached. Patricia Marsh reported that she will be leaving position as Chair after the renewals for 2018 are completed and that Kay Homan will be taking the position.

Nominating & Elections – Report attached. Ruby Silva reported that the officers and directors elected in 2018 to serve with the Chair Christina Babcock and current Directors Nettie Condit and Amy Meilander are: Chair-Elect – Lynette Rocheleau; Secretary – Yolanda Ortega; Treasurer-Tine L. Kelbe, CP, Director – Emmalee Atencio; Director – Yolanda K. Hernandez; Director – Dorothy J. Murphy.

Events Coordination – Report attached.

Membership – Report attached. We currently have 129 active and 14 inactive members. The 2018 renewal cycle has begun. Renewals need to be in by January 15, 2018.

Pro Bono/Community Service – No Report

Professional Development – No Report

Scholarship Committee – Report attached. Nettie Condit reported that the committee received 5 applications for the scholarships. Committee awarded \$250 scholarships to Clarisse Cravens, Julia Garcia and Kelly Slobada.

#### **IV. State Bar Committee Reports**

Access to Justice – Rules and Technology – Report Attached. Amy Meilander reported that the working group received a Public Benefits Eligibility app that will be of benefit to caregivers from the Georgetown Law Center Justice Lab.

Diversity – Report attached.

Commission on Professionalism – Report attached

**V. Old Business** – There was no old business

**VI. New Business**

Barbara Lucero passed the Gavel to Christina Babcock.

There being no further business, upon Motion made and duly seconded, the meeting was adjourned at 12:05 p.m. Next annual meeting is January 5, 2019.

Respectfully submitted

Kay L. Homan, CP, Secretary

**PARALEGAL DIVISION  
ANNUAL MEETING  
January 6, 2018  
2017 CHAIR REPORT**

CHAIR: Barbara C. Lucero, CP

DATE OF REPORT: January 3, 2018

**Board of Bar Commissioners Activities:**

I represented the Paralegal Division at the following events pertaining to the Board of Bar Commissioners ("BBC"):

- January 26, 2017 Diner and Meet & Greet for the BBC and senior staff at Hayashi Japanese Hibachi and Sushi Bar Restaurant
- January 27, 2017 Board Meeting, State Bar of NM
- April 20, 2017 New Bar Commissioner Orientation, State Bar of NM
- July 27, 2017 Board Meeting, Inn of the Mountain Gods, Ruidoso, NM
- September 15, 2017 Board Meeting, State Bar of NM
- December 7, 2017 Board Meeting, State Bar of NM, Swearing-In Ceremony of BBC Officers, followed by a reception, Inn at Loretto, Santa Fe, NM.  
Dinner with one of the applicants for the Executive Director position
- December 8, 2017 Interviews for the Executive Director of the State Bar, Inn at Loretto, Santa Fe, NM

**Paralegal Division Activities:**

I led the following board meetings and attended the following events:

- January 7, 2017 Board Meeting, State Bar of NM
- March 16, 2017 Meet & Greet followed by our Board Meeting, State Bar of NM
- May 13, 2017 Board Meeting, Cuddy & McCarthy, LLP, Santa Fe, NM
- July 27-29, 2017 State Bar Annual Meeting, Inn of the Mountain Gods, Ruidoso, NM
- August 26, 2017 Paralegal Day celebratory lunch, Pappadeaux Seafood Kitchen, Albuquerque, NM
- September 9, 2017 Board Meeting & Planning Session, State Bar of NM
- December 1, 2017 CLE Institute, State Bar of NM followed by our Holiday Dinner at Trombino's Bistro Italiano, Albuquerque, NM

Throughout the year I monitored the Paralegal Division's emails and phone calls. I answered questions and/or forwarded emails to the respective committee or person. We had a small issue with the Young Lawyers Division ("YLD") emailing the Paralegal Division members directly about volunteering at their events. I tried working with their chairperson, Tomas Garcia, requesting

the YLD to email Linda Murphy directly but they continued to email our membership directly about their events. I am happy that they continue to include us but wish they would have worked with Linda directly so we can monitor who within our division is volunteering. I asked Kay Homan to get our Paralegal Day Proclamation early in the year and she was able to get it signed by Governor Martinez.

On April 7th I emailed the Division requesting volunteers for the CLE Coordination Committee. I was happy to receive emails that members were interested in helping the committee but most members had time restrictions and no one wanted to chair the committee. Subsequently, it was co-chaired by Yolanda Ortega, Christina Babcock, and Lynette Rocheleau. They spearheaded the September 23rd Half-Day Mixed Bag CLE held at the State Bar of NM and also the December 1st CLE. Both were well attended and organized events. I appreciate their efforts to make the CLEs happen.

I coordinated with the paralegals in Roswell and surrounding areas so they could have a luncheon for Paralegal Day. Five members attended the luncheon held at the Cattle Baron Restaurant in Roswell on August 26, 2017. I also worked with them for the Holiday Dinner which was held on Saturday, December 2 also at the Cattle Baron Restaurant in Roswell. I hope the paralegals in this area continue to gather for these events.

At our May 13th board meeting I was approved to buy Joe Conte a gift. It was initially wishing him a speedy recovery but we were not able to meet and it later became his get well/fair well gift. On September 19 I delivered his gift on behalf of the Division. He was ever so grateful and said the Paralegal Division is wonderful and always so thoughtful and generous.

It was my pleasure to serve as your chair for 2017 and look forward to taking the roll of Immediate Past Chair and helping Christina as needed. Please contact me with questions

## **PARALEGAL DIVISION**

### **ANNUAL REPORT**

**January 6, 2018**

#### **CHAIR-ELECT REPORT**

##### **CHAIR-ELECT**

Christina Babcock

##### **DATE OF REPORT**

January 6, 2018

As chair-elect, I volunteered to help coordinate the CLEs for September and December 2017. With the help of the committee, we were able to secure speakers and both events took place as scheduled.

I attended the Paralegal Day luncheon, the Christmas dinner, and I also volunteered for the wills for heroes event in Rio Rancho. I assisted the membership committee as co-chair and the scholarship committee as a committee member. I also answered questions from members and potential members in emails that were directed to me.

Barbara helped guide me through 2017 and I hope I can do the same for Lynette, our new chair-elect. I have recently been in contact with the BBC about my role and future meetings. I had a great 2017 and I look forward to serving as your chair in 2018.

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

I was contacted by Linda Murphy who has a unique situation regarding inactive status.

**PARALEGAL DIVISION  
TREASURER'S REPORT  
ANNUAL MEETING  
JANUARY 6, 2017**

**Date of Report: January 4, 2017**

Activities Undertaken in 2017:

The Treasurer has performed the routine duties of the office this year which include timely and accurate payment of invoices, reimbursing members for expenses, depositing income checks, balancing the bank account and reporting to the Board periodically as to the status of the funds in the Division's bank account.

The State Bar's accounting system "intacct" allows us 24/7 on-line access for the Division's Treasurer to view and monitor deposits, check requests and current balances for our account. We continue to receive timely invoices for State Bar Administrative expenses incurred on behalf of the Division. Attached is the year-end 2017 Budget Report. As reflected on the Report, our financial position remains strong. We projected the year-end balance at \$49,379.09. The year-end adjusted balance through December 31, 2017, is \$58,568.51. We continue to exceed our projection as a result of additional fees collected in 2017 for the April Law Day CLE and the CLE Provider(s) Approval requests.

Respectfully Submitted,

Tina L. Kelbe, CP  
Treasurer



**PARALEGAL DIVISION OF STATE BAR OF NEW MEXICO**

2017 Proposed Budget – Approval pending		12/31/17	
	<u>2017 Budget</u>		<u>Status</u>
Operating Reserve Beginning of Year	60,529.09		
<b><u>INCOME</u></b>			
4000- Membership Dues	9,100.00	9,510.00	105%
4300-Interest Earned	100.00	91.74	92%
4805-Seminar Approval Fees	1,500.00	6,625.00	442%
4805-Seminars	1,000.00	795.00	80%
Albuquerque - \$			
4900-Miscellaneous Income			
<b>TOTAL INCOME</b>	<b><u>11,700.00</u></b>	<b><u>17,021.74</u></b>	<b><u>145%</u></b>
<b><u>EXPENSES</u></b>			
Overhead			
5250-Contract Labor	4,000.00	3,872.24	97%
6110-State Bar Administrative Fees	1,500.00	1,144.33	76%
6210-Printing & photocopies	250.00	45.49	18%
6230-Office Supplies	150.00	32.88	22%
6230-Gifts for Members/Member Benefits	5,000.00	3,570.39	71%
6270-Postage	250.00		0%
6140 - Contributions to State Bar Annual			
Mtg	5,000.00	5,000.00	100%
6140 – Contributions – State Bar Silent			
Auction	500.00	500.00	100%
6140 – Contributions – Miscellaneous	500.00		0%
<b>Communications</b>			
6160-Receptions/Meetings	7,000.00	3,093.21	44%
6310-Travel Expenses	750.00	176.78	0%
<b>Continuing Legal Education</b>			
6741 - Seminars	8,500.00	447.00	5%
6751 - Regional Scholarships	1,000.00	1,000.00	100%
6995-Miscellaneous Expenses	150.00	100.00	67%
<b>TOTAL EXPENSES</b>	<b>34,550.00</b>	<b>18982.32</b>	<b>55%</b>

Joe Conte

Gain (Loss)	(22,850.00)
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<b>Projected year-end balance 12-31-16</b>	<b>\$60,529.09</b>
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Projected year-end balance 12-31-17	<b>\$49,379.09</b>
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<b>Balance in Checking Acct. 12-31-17</b>	<b>\$58,568.51</b>
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Pending Checks/Deposits:

\*\*\*Year-end seminar \$219 per member  
recommend PD pays \$60  
members pay \$189  
Price will be \$249 for 2017

## **PARALEGAL DIVISION**

### **ANNUAL REPORT**

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

**COMMITTEE CHAIR:** Deborah R. Tope, CP, RP

**COMMITTEE MEMBERS:** Amy Meilander

**DATE OF ANNUAL REPORT:** January 6, 2018

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

[http://www.nmbar.org/Nmstatebar/About Us/Paralegal Division/Paralegal Division.aspx?WebsiteKey=687d8cd9-4ff9-4f83-a12f-6657211dab17&hkey=7fea2437-2fa2-4acd-bef2-6d8e1d012f43&New\\_ContentCollectionOrganizerCommon=1#New\\_ContentCollectionOrganizerCommon](http://www.nmbar.org/Nmstatebar/About%20Us/Paralegal%20Division/Paralegal%20Division.aspx?WebsiteKey=687d8cd9-4ff9-4f83-a12f-6657211dab17&hkey=7fea2437-2fa2-4acd-bef2-6d8e1d012f43&New_ContentCollectionOrganizerCommon=1#New_ContentCollectionOrganizerCommon).

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

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

The tabbed pages across the menu bar are the materials that are most often changed such as the calendar of events, member directory & CLE credits table. Materials that are more static, such as the bylaws, standing rules, MCLE requirements and more are accessible through links to down the

middle of the home (or About) page. In 2017, the committee resumed posting minutes and reports from the Division's Annual Meeting and Board meetings on the separate tab called Minutes of PD Board Meetings.

At the end of August, the State Bar web server was upgraded. The upgrade caused the State Bar web pages to be unstable for more than two weeks. During that time, the web page committee team kept in touch with the State Bar web server administrator to ensure that no pages in the Paralegal Division were lost and updates to the web pages that needed to happen were done on time. We were also informed by the State Bar that account password criteria changed and now requires all passwords to be at least 7 characters, with one being numeric. Passwords for new members are set using the new criteria.

During the membership renewal period, starting mid-November, there is a link located on the home page of the Division's section to the renewal form. The deadline for submitting membership renewals is January 15, 2018. When the renewal period is over, the link to the renewal form is removed from the home page to avoid confusion among forms.

The schedule of events for 2018 has been posted on the web page. Updates to the Officers & Directors, committee chairs will be made shortly before or immediately after the Annual Meeting. Information on any CLE programs scheduled will be posted as they become available.

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

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

Members can contact the Division by regular postal mail or by sending an e-mail to [pd@nmbar.org](mailto:pd@nmbar.org). Inquiries will be directed to the appropriate person for a response. Communicating by e-mail is a cost-effective method of keeping our members informed so please ensure that we have your current e-mail address. You can send inquiries, questions and address changes, including any e-mail address changes, to the Division by e-mail to [pd@nmbar.org](mailto:pd@nmbar.org).

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

**Deborah Tope**

**Amy Meilander**

Web Page/ENews Committee

**PARALEGAL DIVISION  
ANNUAL MEETING  
January 6, 2018**

**CLE REPORT**

**CLE COMMITTEE MEMBERS:** Christina Babcock

Lynette Rocheleau

Carolyn Winton

Linda Murphy

Yolanda Ortega

**DATE OF REPORT** January 4, 2018

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

The committee coordinated the CLEs for September and December 2017.

**September CLE**

- The committee was able to get MCLE approval and three speakers to present.
- Helped prepare the full-page color ad that ran in the Bar Bulletin and I hosted the CLE.
- I believe we had less than 20 attendees.

**December CLE**

- I worked with Vanessa Sanchez at the State Bar to coordinate the December CLE.
- Helped prepare the full-page color ad that ran in the Bar Bulletin and I hosted the CLE.
- We had a total of 60 registrants: 34 in-person and 25 via webcast.

**COMMENTS:**

- The division needs a chair or co-chairs and a few more members for 2018.

**CLE PROVIDER(S) APPROVALS COMMITTEE  
BOARD MEETING  
January 6, 2018**

**COMMITTEE TITLE: CLE PROVIDER(S) APPROVALS**

**COMMITTEE CHAIR: TINA L. KELBE**

**COMMITTEE MEMBERS: KAY HOMAN, LINDA MURPHY, AND PATRICIA MARSH**

**DATE OF REPORT: January 4, 2018**

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

- ☐ Received and reviewed CLE provider approval requests
- ☐ Total collected January 1, 2017 – December 31, 2017 \$6,625.00
- ☐ E-mails from and to Members re seminar approvals

**STATE BAR OF NEW MEXICO PARALEGAL DIVISION**  
**ANNUAL COMMITTEE REPORT**  
**COMMITTEE TITLE: CLE Tracking Committee**  
**COMMITTEE CHAIR: Patricia Marsh**

**COMMITTEE MEMBERS:**

**DATE OF MEETING:** Annual Meeting – January 6, 2018

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

Since the Annual Report in January, 2017, I have continued my practice of reporting updated CLE credits as they are reported to me. No members were dis-enrolled during the renewal period for 2017 for failure to complete required credits for renewal.

**ONGOING ACTIVITIES:**

I have just completed an updated 2017 CLE credits table. Once we have had a chance to cross-check the list with the membership renewals, I will notify members who are delinquent and will work with them to make sure they have the credits they need. I have continued to try to prepare an updated spreadsheet of CLE credits for posting on the webpage as frequently as possible.

**ISSUES REQUIRING BOARD ACTION:** None

**ATTACHEMENTS:** None

**COMMENTS:** As I notified the board in September 2017, I will be leaving my position as CLE Tracking Chair after the renewals for 2018 are completed. Kay Homan will be taking over that task, and I will provide her with the materials at that time



## **PARALEGAL DIVISION**

### **2017 ANNUAL COMMITTEE REPORT**

**COMMITTEE TITLE:** **NOMINATING AND ELECTIONS**

**COMMITTEE CHAIR:** **RUBY SILVA**

**COMMITTEE MEMBER:** **NETTIE CONDIT**

**DATE OF MEETING:** **January 6, 2018**

**DATE OF REPORT** **January 6, 2018**

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

The deadline for submitting Declaration of Candidacy Forms for the 2018 Election was October 16, 2017. The Election Committee received the following Declaration of Candidacy Forms:

- Chair Elect – Lynette Rocheleau
- Secretary: Yolanda Ortega
- Treasurer – Tina L. Kelbe, CP
- Director – Emmalee Atencio
- Director – Yolanda K. Hernandez
- Director – Dorothy J. Murphy

On October 23, 2017, Ruby Silva met with Pam Zimmer of the State Bar to discuss the elections.

The following criteria was followed by the Election Committee:

- Starting the Elections on November 1<sup>st</sup>
- Setting up reminders to go out to the Members that have not voted
- Testing the election system to make sure the online election process works correctly
- Setting up the elections so people could choose not to vote for someone
- Ensuring that the write-in feature worked
- Names appeared in random order on the ballot, so no one has an advantage

On November 1, 2017, the State Bar sent out the Committee's letter to the Members with the link to the voting site. The deadline for voting was November 20, 2017. Several reminders were sent to the Members that had not cast their votes. The reminders were sent out by Online Elections. This reminder goes only to the Members that have not voted, so Members who had already voted were not bothered with unnecessary emails to vote.

The Committee monitored the number of votes received during the Election process to assure the Division had the necessary votes for a valid election.

**ONGOING ACTIVITIES:**

None

**ISSUES REQUIRING BOARD ACTION:**

None

**ATTACHMENTS:**

Certification of the 2018 Election.

**COMMENTS:**

None

**STATE BAR OF NEW MEXICO  
PARALEGAL DIVISION  
NOMINATING AND ELECTIONS COMMITTEE  
CERTIFICATION OF 2018 ELECTION**

I, Ruby Silva, as Chair of the Nominating and Elections Committee of the Paralegal Division, do hereby certify the following results for the 2018 Election.

POSITION	CANDIDATE	NO. OF VOTES
Chair-Elect	Lynette Rocheleau	78
Secretary	Yolanda Ortega	77
Treasurer	Tina Kelbe CP	75
Board Member	Emmalee Atencio	69
Board Member	Yolanda K. Hernandez	71
Board Member	Dorothy J. Murphy	73

I further certify that there were 78 ballots received by the deadline for voting. No write-in votes were received.

Signed this 2<sup>nd</sup> day of December 2017.

*Ruby Silva*

Ruby Silva, Chair  
Nominating and Elections Committee

**PARALEGAL DIVISION**  
**Board of Directors Annual Meeting**  
**January 6, 2018**

**EVENTS COMMITTEE REPORT**

COMMITTEE CHAIR: Nicole Saunders

COMMITTEE MEMBER: Barbara Lucero

DATE OF REPORT: January 6, 2018

Below is the annual report for the Events Committee.

The committee organized the following events during the 2017 calendar year:

- Lunch at the State Bar of New Mexico ("SBNM") for our annual meeting on January 8, 2017 .

- Refreshments for our Meet & Greet at the SBNM on March 16th.

- Refreshments and lunch for our regular called board meeting at the Cuddy & McCarthy Law Firm in Santa Fe on May 13th.

- Lunch at Pappadeaux Seafood Kitchen in Albuquerque to celebrate Paralegal Day on August 26th.

- Refreshments and lunch at our regular called board meeting at the SBNM on September 9th.

- A holiday dinner at Trombino's restaurant in Albuquerque on December 1st.

## PARALEGAL DIVISION

COMMITTEE TITLE: Membership

COMMITTEES: Christina Babcock and Kathy Campbell, Co-Chairs  
Kay Homan and Linda Stocky, Members

DATE OF REPORT: January 6, 2018

### **2017 Membership Activities**

- 110 active members renewed (59 online and 41 by mail)
- 3 members were approved after September 1<sup>st</sup> and did not need to renew
- 2 members transferred to inactive status
- 13 active members were disenrolled for nonrenewal
- 7 inactives were disenrolled for nonrenewal
- 16 new members were approved during the year
- We currently have 129 active members and 14 inactives.

We have also begun the 2018 membership renewal cycle with an e-mail to members sent on November 15.

## **PARALEGAL DIVISION**

**COMMITTEE TITLE:** Scholarship Committee Annual Report

**COMMITTEE CHAIR:** NETTIE CONDIT

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

**DATE OF MEETING:** January 6, 2018

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

On September 5, 2017, the Scholarship Flyer was emailed to CNM, Dona Ana Community College and Santa Fe Community College. The deadline for applications was November 1, 2017. A total of five applications were received –

Clarisse Cravens  
Julia Garcia  
Kelly Slobada  
Celeste Kristina Jaramillo  
Tiffany Vigil-Montano

The committee selected three scholarship winners – Clarisse Cravens, Julia Garcia and Kelly Slobada. Each winner received a check in the amount of \$250.

There were no responses from Dona Ana Community College or Santa Fe Community College.

**ONGOING ACTIVITIES:** None

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

None at the present.

### **ATTACHMENTS:**

None

### **COMMENTS:**

**PARALEGAL DIVISION  
ANNUAL REPORT**

**COMMITTEE TITLE:** Access to Justice Technology Working Group

**COMMITTEE CHAIR:** Amy Meilander

**DATE OF ANNUAL REPORT:** January 6, 2018

In November 2017, the Working Group received a call for proposals from the Georgetown Iron Tech Lawyer App project. The Iron Tech Lawyer app project is comprised of students at Georgetown's Technology, Innovation and Access to Justice Center and is a practicum class in which "students collaborate with organizations to build web-based apps that further the goal of increasing meaningful access to the legal system." This is done at little or no cost to the organization. This year, they would accept up to seven projects.

Carol Garner, chair of the Working Group, submitted an RFP with the idea of a Public Benefits Eligibility app that would "guide a Caregiver through a series of questions about the family composition and circumstances in such a way as to gather necessary information to determine which public benefits for which the family might be eligible and then undergo a calculation to provide a result as to whether the family is actually eligible." (see attached proposal). If the project is accepted, the Georgetown students will collaborate with four organizations in New Mexico: Law Access New Mexico, Pegasus Legal Services for Children, New Mexico Legal Aid, and New Mexico Center on Law and Poverty. Carol was contacted in December that the project was accepted and students from the Georgetown Law Center Justice Lab will be contacting Carol by January 26, 2018 to start the project.

**Amy Meilander**

## **PUBLIC BENEFITS ELIGIBILITY TOOL FOR NEW MEXICO CAREGIVERS**

FROM: • Law Access New Mexico in conjunction with other New Mexico legal service providers

### **GOAL:**

- New Mexico's legal service programs would like to build a 'Public Benefits Eligibility App' targeted at "Caregivers families".

### **NEED:**

- New Mexico has a significant population of non-parent caregivers who are raising children who are not their own biological children.
- One of the "non-legal" basic services that many of these families almost always need is public benefits for these children & the households in which they live. Neither the availability of these benefits nor the eligibility requirements are well-known; they are certainly not uniform for various types of benefits. New Mexico typically ranks in the top 5 of households with children living in poverty, and assisting these families in determining their eligibility for public benefits can help reduce this poverty level.

### **BACKGROUND:**

- Pegasus Legal Services for Children provides extended services to caregivers seeking court orders to be appointed as Kinship-Caregivers for children living with them but who are not their own biological children. These children are being cared for by people other than their parents due the parents' inability to provide appropriate parenting.
- Law Access New Mexico's Guardianship Legal Helpline service provides initial intake services to these caregivers, including advice and counsel, coaching for self-representation for court filings and referrals to Pegasus for extended services & representation.
- Many of the initial applications for legal services come to Law Access New Mexico through the successful Together-For-Justice online triage application process developed by New Mexico Legal Aid in conjunction with Neota Logic & Pro Bono Net.
- Most of these families being served desperately need to be educated about their eligibility for public benefits.
- Earlier in 2017, Law Access New Mexico's Guardianship Legal Helpline staff, with help from Neota Logic staff, attempted to create such a tool to determine a family's eligibility for public benefits. Lack of staff and time prevented this effort from moving forward very far.

### **COLLABORATION:**

- New Mexico has several legal services programs that regularly collaborate on various projects so there are several resources from which to pull Subject Matter Experts, while Law Access New Mexico would take the lead.

### **TARGET:**



- New Mexico's legal service programs would like to build a 'Public Benefits Eligibility App' that would initially be targeted at our state's Caregivers' families. END RESULT: It is hoped that the App would:
- Improve the quality of life of the low-income families parenting children who cannot currently be parented by their own parents by providing better access to public benefits for which the families are eligible.
- Guide a Caregiver through a series of questions about the family composition and circumstances in such a way as to gather necessary information to determine **which** public benefits for which the family might be eligible and then undergo a calculation to provide a result as to whether the family is actually eligible.
- Be available through any New Mexico legal or community services agency that wanted to provide information and a link from their website. See 'Endnote I' for currently existing legal services programs that could provide these links. Law Access New Mexico's Guardianship Legal Helpline would also provide information about the App's availability to all of the applicants who contact it. (480 applicants in 2017 to date; 753 applicants in 2016)
- While use of the app would not be restricted to low-income families, many of the benefits are only available to low-income families. However, there are some benefits that calculate eligibility only upon a child's income and resources, and thus the household in which the child lives would also benefit, regardless of the Caregivers' incomes.
- The App could be used either by an individual Caregiver or by social service agencies providing support services to the Caregiver and her/his family.
- Because many of the State benefits have similar but not fungible eligibility requirements, developing an App specifically for New Mexico families is needed instead of just trying to insert any currently existing app into a New Mexico legal services or social services program management.
- A future step that would be optimal would be to structure the App so that it could actually submit the gathered information to the public agency which receives applications for benefits so that the family need not reconstruct the information already provided to the app.

#### CONTACT INFORMATION:

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Law Access New Mexico

Pegasus Legal Services for Children

New Mexico Legal Aid

New Mexico Center on Law and

PARALEGAL DIVISION  
ANNUAL MEETING  
January 6, 2018

COMMITTEE ON DIVERSITY IN THE LEGAL PROFESSION ORAL REPORT

LIASON  
DATE OF ORAL REPORT

Yolanda Hernandez  
January 6, 2018

Co-chairs: Breanna Henley and Leon Howard

ACTIVITIES UNDERTAKEN:

Email to Breanna that I would not attend the Nov. 27, 2017 meeting. Meeting Minutes for August 28, 2017 were approved at this meeting.

Review email from Breanna along with attached Committee's Meeting Minutes for meeting held August 28, 2017.

Arturo Jaramillo Clerkship Program (Subcommittee: Mo Chavez, Chair). Mo continues to assist with this program to coordinate student placement for their clerkship with a law firm. NMBBC agreed to pay a stipend for 2018.

Joe Conte retired and move out of state (Michigan/Florida) to be with family. CDLP discussed recognition ideas.

Revocation of DACA to severely affect law students so a task force will be created to target and plan of action.

ABA acknowledged CDLP's continuous reports regarding diversity. Richard Spinello to be contacted regarding funds for Research and Polling. A Date Sub-committee to be established by CDLP.

Review Breanna's email dated September 14, 207 regarding July 2017 Bar Exam pass list and "stats" regarding the Committee's Bar Exam Attorney Coach Program which was posted on the NMBBC's website. This Program was a big success with a pass of 91% which exceeded the 80% expected to pass.

This Committee continues to work directly with UNM staff, students and NMBBC to coordinate, organize and collect data from various resources so the Bar Exam Coaching Program continues to run efficiently for the law students.

**PARALEGAL DIVISION  
ANNUAL MEETING  
January 6, 2018**

**STATE BAR COMMISSION ON PROFESSIONALISM REPORT**

**MEMBER:** Evonne Sanchez

**DATE OF REPORT:** January 3, 2018

**ACTIVITIES UNDERTAKEN SINCE LAST REPORT:**

Attended the Commission on Professionalism meeting on June 27, 2017

- Welcome to Commission by co-chair, Justice Edward Chavez
- Approval of Minutes from 06/10/16 meeting
- Staffing change for BTG Mentorship Program-Announcement of Jill Yeagley's new position and her replacement by Stormy Ralstin.
- Review and Discussion of 2016 Annual Report
- Curriculum Update/Proposed Change

Email correspondence with Jill Yeagley concerning continuation on Commission 1-12-17

Email correspondence with PD Chair Barbara Lucero and Jill Yeagley concerning continuation on Commission 1-19-17

Review New Mentor applications 1-23-17

Review New Mentor applications 1-25-17

Review 2016 Annual Report 4-6-17

Review Minutes and Second Quarter Report 7-26-17