

# Greater Lexington Paralegal Association Board of Directors

## 2014 ANNUAL REPORT



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# GREATER LEXINGTON PARALEGAL ASSOCIATION

The Greater Lexington Paralegal Association celebrated its 34<sup>th</sup> Anniversary in 2014. We continued our affiliation with the National Federation of Paralegal Associations (NFPA) and Kentucky Paralegal Association (KPA). At the end of the year we had 85 members.

The Board of Directors gathered for 11 meetings in 2014 and a quorum was met at each meeting. The Board also had a leadership Retreat for brainstorming to come up with new ideas and to get to know one another.

In November, Tammy Smith and her dedicated KPA Conference Committee culminated with the arrival of paralegals from all over Kentucky convening in Lexington for the annual KPA Conference. Registration and social activities began on Thursday evening with music. CLE classes were held on Friday along with the awards luncheon and annual meeting which included the introduction of the 2015 officers. On Saturday, the Certified Kentucky Paralegal exam was given. This was another outstanding event thanks to the hard work of a very dedicated group of individuals.

CLE meetings were held each month except for July and December. The 34<sup>th</sup> Anniversary Luncheon was held in July with our special guest speaker from LFUCG, Detective David Richardson, who spoke on forensics. The Annual Awards Luncheon was held in December.

A Spring Social was held at Alltech which included a tour and the Fall Social was held at Ramsey's for a nice laid back lunch.

Two PACE scholarships were presented in 2014. Melissa Taulbee and Therese Warrick were awarded one at the Annual Luncheon in December. Cody Drury was the recipient of the annual GLPA Scholarship presented at the Annual Luncheon and received a check for \$500 and a free one year student membership in the GLPA.

We gave blood at the GLPA sponsored blood drives, donated time at the Pro Se Divorce Clinics, and donated cell phones to soldiers. In addition, we collected money for the Ronald McDonald House, Lexington Humane Society and sent Christmas cards to service members.

The year wrapped up with the Annual Awards Luncheon which was held on December 11, 2014 at the Hyatt. Awards were presented after the members of the GLPA voted for Helen Bongard as most outstanding speaker, Steve Barker of Sturgill, Turner, Barker & Moloney as most supportive attorney and Sturgill, Turner, Barker & Moloney as most supportive law firm. The Donald E. Eppler Commitment Award was presented to Heather Purnell. Heather Purnell presented the President's Award to Debra Gibby. Each person in attendance received a gift card from Action Court Reporter, our generous sponsor and a wonderful lunch was enjoyed by all.

# PRESIDENT

## *Heather Purnell*

In accordance with the GLPA Policies and Procedures manual, the following items were completed by the GLPA President during the 2014 calendar year:

- Presided over all GLPA Board Meetings and leadership Retreat
- Presided over all GLPA Monthly CLE Meetings and made announcements (with the exception of March)
- Contributed the President's column for the GLPA newsletter on a quarterly schedule
- Contributed articles and member spotlight to quarterly newsletter
- Worked with the Treasurer to prepare a budget
- Maintained close contact with all Officers and Committee Chairs to ensure that the goals of the Association were maintained
- Presided over the Anniversary Luncheon and Annual Luncheon
- Attended the Spring and Fall Socials
- Assisted with the KPA Conference held in Lexington in November
- Attended the KPA conference in November
- Volunteered at a probono divorce clinic
- Communicated with membership through periodic emails
- Communicated with membership in person
- Assisted with CLE luncheon assistance
- Coordinated Half Day CLE

# Vice President End of Year Report

Tammy Martinez

As Vice President, I have completed the duties as outlined in the GLPA Policies and Procedures manual during the 2014 calendar year.

The GLPA had a total of 85 members for 2014.

**SECRETARY  
ANNUAL REPORT  
J. Elizabeth Boggs  
2014 Calendar Year**

In accordance with the GLPA policies and procedures manual, the following items were completed by the Secretary during the 2014 calendar year:

- 1) Attend monthly GLPA board meetings.
- 2) Attend monthly CLE meetings.
- 3) Attend July and December luncheons, schedule permitting.
- 4) Attend special events, schedule permitting.
- 5) Take minutes for each board meeting, prepare same and circulate for review prior to the next scheduled board meeting.
- 6) Submit articles for GLPA newsletter.
- 7) Receive and make note of any proxy given prior to board meeting.
- 8) Document any email votes and include same in minutes for next board meeting.

# GLPA TREASURER 2014

## Terri Marksbury

In accordance with the GLPA Policies and Procedures manual, the following items were completed by the Treasurer during the 2014 calendar year, beginning Terri Marksbury's term May, 2014:

- Reviewed previous records from 2014, transitioning Lori Colson's term as Treasurer 2014;
- Deposited all incoming funds/disbursed funds as necessary;
- Prepared monthly treasurer reports;
- Prepared treasurer summaries for newsletters;
- Reviewed records for website expenses;
- Attended monthly board meetings and CLE luncheons;
- Prepared and remitted Quarterly Dues Reports to NFPA;
- Reviewed monthly Dupree Mutual Funds statement re value of funds;
- Maintained records so they are ready for the upcoming 2015 year.

## **2014 REPORT OF NFPA REPRESENTATIVES**

By: Glenna Fugazzi, RP, NFPA Primary  
Tammy Smith, CKP, NFPA Secondary

The year has been filled with monthly Region 3 conference calls and bi-monthly reports for the *Inside*. Our Region 3 Director has worked very closely with each Association to promote participation and availability for questions or for any issues that may arise within our respective Associations or within the state. The Primary Representative attended the 2014 Annual Conference in Dallas, Texas from October 9 through October 12, 2014. This meeting was filled with an all-day Region Meeting on Friday and Policy Meeting on Saturday as well as Sunday. A detailed report of the meeting was timely presented to the Board and reported in the *Para-Phrases*.

Due to budgetary constraints, the Representatives did not attend the Region 3 meeting which was held in the Spring in Cleveland, nor did the GLPA send anyone to the Joint Conference held March 21-23 at the Bunker Hill Community College in Boston, Mass.

Articles were prepared and submitted to the GLPA Newsletter Chair for inclusion in our *Para-Phrases* as requested.

The Primary and Secondary Representatives have been on call throughout the year to review and respond to questions, emails and issues that may arise within the Region and throughout the NFPA.

## KPA Liaison End of Year Report 2014

It's been an exciting year for the KPA at year's end there were 209 Active members in the KPA.

The Western Kentucky Paralegal Association (WKP) hosted their Annual Meeting in May. CLE's this year included topics such as Family Law, Mediation Practice and Kentucky Concealed Carry Laws. WKP members gave back to the community by packing gift bags for residence of Murray Group Home, and in August collected school supplies for donation to a Family Resource Center of a local school.

The Northern Kentucky Paralegal Association (NKAP) hosted various CLE's throughout the year such as "From our oldest to your Youngest – Hand in Hand" CLE in May at Beckfield College, in Florence KY. Topics included Child Advocacy and Ethics. NKAP supported the Northern Kentucky Boys Home and enjoyed networking opportunities at a pot luck/networking session during the Holidays.

The Louisville Association of Paralegals (LAP) started off the year with a lecture by agents from the United States Marshall's office. LAP members volunteered in the community by hosting a dinner at Ronald McDonald House in August and Gilda House in the fall. LAP wrapped up the year by Hosting the 2014 Legal Technology Summit at the Hall of Justice in November and partnering with the Louisville Bar Association in a membership merger that allowed LAP paralegals to be members of the Louisville Bar Association and enjoy various benefits which previously were only granted to attorney bar members.

The Southern Kentucky Association of Paralegals (SKAP) based out of Bowling Green formed last year after much effort by paralegals in that area to form a professional organization for their paralegals to have networking, educational and social opportunities within their local area. SKAP had their first Annual Meeting on July 15<sup>th</sup> with 37 members.

The 2014 KPA Conference was held in Lexington this year with 147 attendees. Speakers included Kentucky's State Law Librarian which spoke on legal research what's free online, Ethics of Investigating with Social Media by Kentucky Supreme Court Law Clerk Shawn Chapman, a CLE on Weed and Speed: Substance Abuse and Drug Courts by attorney Helen Bongard and various other excellent speakers.



## **BOARD-AT-LARGE YEAR-END REPORT**

### **Fundraising - Sponsors**

Action Court Reporters was our only sponsor (Diamond sponsor) in 2014; they, of course, received the benefit of a full page ad in Para-Phrases each quarter. Judy, at Action, has confirmed Action's commitment to again be a Diamond sponsor in 2015. Solicitation emails have also gone out to Collins Sowards Lennon Reporting, Sworn Testimony, and An/Dor Reporting, resulting in An/Dor committing to a full page ad this year. No response thus far from CSL Reporting and Sworn Testimony.

### **Fundraising - Advertising**

Sworn Testimony carried a full page ad in Para-Phrases for the entire year-2014 (\$225); Collins Sowards Lennon Reporting carried a full page ad for the last two quarters of 2014 (\$150); An/Dor Reporting carried a half-page ad for the entire year-2014 (\$150) and has committed to a full page ad in 2015.

### **Fundraising - Logo Items**

Remaining GLPA logo items in stock (T-shirts, cookbooks, imprinted pen/styluses, and thermal totes) include the following: (totes: 2 blue, 11 red, 7 green, 5 purple for total of 25 (\$8/ea); 88 cookbooks (\$5/ea); t-shirts: 9 small, 16 medium, 23 large, & 1 x-large for total 44 (\$5/ea); and pen/stylus 23 (\$2.50/ea)). If all are sold for the referenced prices, the association would make \$917.50. Note: These items are also used as door prizes.

### **Fundraising – Selling Mums**

The sale of fall mums netted the GLPA \$316; online sale of bulbs netted an additional \$33, for a total fund raiser total of \$349 for the sale of mums/bulbs.

### **Fundraising – Good Shop/Good Search**

A check in amount of \$42.12 was earned by members using Good Shop/Good Search. Thanks for your support!

### **Misc. Sponsorship**

STBM sponsored two cle luncheons in 2014.

Thank you.

**Debra L. Gibby, RP®, CKP**  
**GLPA 2014 Board-at-Large**

## CLE COMMITTEE CHAIR

### *Vacant after June – Many members stepped up*

In accordance with the GLPA Policies and Procedures manual, the following items were completed by the CLE Committee Chair during the 2014 calendar year:

- Helped to secure monthly speakers, and sponsors for monthly CLE meetings
- Prepared and distributed CLE certificates to R.P.'s and CKP's that attended monthly CLE meetings
- Attended GLPA Board Meetings
- Obtained door prizes and speaker gifts

## 2014 YEAR END REPORT FOR PHILANTHROPY

Melanie Sennett

As the Philanthropy Chair for 2014, in addition to the activities we do every year such as the blood drives and helping with the Pro Se Divorce Clinic, I wanted to focus on some local issues and our service men and women. For the year 2014, I completed the following as Philanthropy Chair:

1. Attended majority of monthly board meetings
2. Attended majority of monthly CLE lunches
3. Attended the July Anniversary Luncheon and the December Holiday Luncheon
4. Solicited volunteers from the GLPA members to assist at the Pro Se Divorce Clinics
5. Assisted in organizing a blood drive in June and again in December for the Kentucky Blood Center which resulted in a total of 33 pints of blood being donated.
6. Organized a cell phone collection for Cell Phones for Soldiers which resulted in 16 cell phones being donated.
7. Collected \$140 worth of items and cash for the Ronald McDonald House donated by the GLPA members.
8. Collected donations totaling around \$255 for the Lexington Humane Society donated by the GLPA members.
9. Purchased and got GLPA members and others to sign and include personal messages to over 150 Christmas Cards that were delivered to the Red Cross for delivery to Veterans and Service Members.
10. Assisted in obtaining door prizes for our various luncheons and other activities.

## **JOB BANK CHAIR ANNUAL REPORT FOR 2014**

Janet L Mitchell

In accordance with the GLPA policies and procedures manual, the following items were completed by the Job Bank chair during the 2014 calendar year:

- 1) Attended monthly GLPA board meetings
- 2) Attended monthly CLE meetings
- 3) Attended July and December luncheons
- 4) Reviewed job openings, have job openings posted on GLPA web site, and forward job postings to GLPA members
- 5) Submit articles to GLPA newsletters

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Greater Lexington Paralegal Association

**GLPA**

Since 1980

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## **NEWSLETTER CHAIR YEAR-END REPORT**

In 2014, newsletters were published quarterly (March/June/September/December) with Sworn Testimony buying a full page for the entire year (225); Collins Sowards Lennon Reporting carried a full page ad for the last two quarters of 2014 (\$150); An/Dor Reporting carried a half-page ad for the entire year-2014 (\$150). Solicitation emails have gone out to each of these advertisers; resulting in An/Dor committing to a full page ad this year. A check should be received for \$225. No response thus far from CSL Reporting and Sworn Testimony.

Thank you.

**Debra L. Gibby, RP®, CKP**  
**GLPA 2014 Board-at-Large**

# SPECIAL EVENTS CHAIR

## *Heather Purnell*

In accordance with the GLPA Policies and Procedures manual, the following items were completed by the Special Events Chair during the 2014 calendar year:

- Attended Board Meetings
- Chaired the Special Events Committee
- Organized the Spring Social in April at Alltech
- Coordinate RSVP's for Social
- Created Flyer for Social
- Organized Anniversary Luncheon in July
- Obtained Location and Speaker
- Requested donations for Door Prizes
- Coordinated RSVP's and planned menu
- Created Luncheon Brochure
- Organized the Fall Social in October at Ramsey's
- Obtained Location
- Organized the December Annual Meeting in December
- Coordinated the RSVP's, planned menu, and created Luncheon brochure
- Assisted with KPA Conference

## **2014 STUDENT RELATIONS END OF YEAR REPORT**

On request from ECU, several members attended a seminar class to discuss the paralegal profession and the expectations they should have upon seeking employment, etc. There was positive feedback from all those involved and it should be expected for members to be asked to do the same in the future.

I revised the student scholarship form and sent it to ECU, Sullivan and the membership. We only received two applications and the scholarship was ultimately awarded to Cody Drury.

- Charity Foster

## **CERTIFICATION AMBASSADOR**

Beverly Rawlings, RP®

In accordance with the GLPA Policies and Procedures Manual, the following items were completed by the Certification Ambassador during the 2014 calendar year:

- Attended and participated in some GLPA Board meetings;
- Worked with board to establish a second yearly scholarship that can be used for either the PACE exam or the PCCE exam;
- Corresponded with GLPA members and NFPA representatives regarding PACE, PCCE, and required CLE;
- Corresponded with paralegals interested in taking PACE exam or PCCE exam;
- Insured that the PACE/PCCE information maintained on the GLPA website was current along with the list of GLPA members that are also PACE registered paralegals; and
- Organized the PACE/PCCE exam scholarship drawings for December 2014, which were won by Therese Warrick and Melissa Taulbee (both will take the PACE exam)

Note: The GLPA Board changed the name of this position from "PACE Ambassador" to "Certification Ambassador" at the beginning of 2014.

## **2014 PAST PRESIDENT END OF YEAR REPORT**

I drafted the 2015 Board election nomination form and send to the membership. Upon receiving the nominations, the individuals who were nominated where contacted to see if they would like to accept their nomination(s). Upon completing this, I drafted the 2015 Board election form and sent the same to the membership. Another member, Mary Campbell, assisted in gathering the voting results.

I also drafted the awards nomination form and sent the same to the membership. Other individuals, including but not limited to Mary Campbell, assisted in gathering and tallying these results. After the results were finalized for awards, Heather Purnell ordered the trophies for the awards.

- Charity Foster

**IT CHAIR**  
Beverly Rawlings, RP®

In accordance with the GLPA Policies and Procedures Manual, the following items were completed by the IT Chair during the 2014 calendar year:

- Attended and participated in some GLPA Board meetings;
- Created and administered a Facebook page for the GLPA;
- Updated the GLPA board email addresses at the beginning of the year;
- Updated the GLPA listserv with email addresses;
- Participated in conference call with Southern Kentucky Association of Paralegals about setting up a Facebook page for their association; and
- Updated the website and Facebook with events and announcements