

Greater Lexington Paralegal Association Board of Directors

2015 ANNUAL REPORT



TABLE OF CONTENTS

Association Overview	3
President	4
Vice President	5
Secretary	6
Treasurer	7
NFPA Representatives.	8
KPA Liaison	9
Board-at-Large	10
CLE Committee Chair.....	11
Philanthropy Chair	12
Job Bank Chair	13
Newsletter Editor	14
Special Events Chair	15
Student Relations Chair.....	16
Certification Ambassador.....	17
Past President.....	18
IT Committee Chair.....	19

GREATER LEXINGTON PARALEGAL ASSOCIATION

The Greater Lexington Paralegal Association celebrated its 35th Anniversary in 2015. We continued our affiliation with the National Federation of Paralegal Associations (NFPA) (where we even submitted a bid to host a conference) and Kentucky Paralegal Association (KPA). At the end of the year we had 89 members.

The Board of Directors gathered for 11 meetings in 2015 and a quorum was met at each meeting. The Board discussed the current policies and procedures as well as the Bylaws and the need for updating them in 2016.

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 2016 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 35th Anniversary Luncheon was held in July with our special guest speakers from the Lexington Humane Society in which two adorable dogs were also in attendance. The Annual Awards Luncheon was held in December.

A Spring Social was held at the Roller Derby. The Fall Social was held in conjunction with our October CLE at Sullivan, who kindly provided the location and lunch.

Two PACE scholarships were presented in 2015. Stephanie DeWitt and Rebekah Walton were awarded the scholarships for PACE. Shelby Schakelford 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 collected donations for the Lexington Humane Society. In addition, 4 members cooked a dinner at the Ronald McDonald House. We also collected donations for the Lexington Rescue Mission, money for the Nepal Water Missions, and sent Christmas cards to local veteran nursing homes with personal messages.

The year wrapped up with the Annual Awards Luncheon which was held on December 3, 2015 at the Hilary Boone Center. Awards were presented after the members of the GLPA voted for Helen Bongard as most outstanding speaker, Steve Barker of Sturgill, Turner, Barker & Moloney and Laura Day DelCotto of DelCotto Law Group tied as most supportive attorneys and Sturgill, Turner, Barker & Moloney as most supportive law firm. The Donald E. Eppler Commitment Award was presented to Liz Boggs. Heather Purnell presented the President's Award to Bev Rawlings. 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 2015 calendar year:

- Presided over all GLPA Board Meetings
- Presided over all GLPA Monthly CLE Meetings and made announcements
- Contributed the President's column for the GLPA newsletter on a quarterly basis
- 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 Fall Social
- Attended the KPA Conference held in Lexington in November
- Communicated with membership through periodic emails
- Communicated with membership in person
- Assisted with CLE luncheon assistance
- Assisted with Half Day CLE coordination

2015 VICE PRESIDENT END OF YEAR REPORT

I collected membership applications over the year and determined if individuals met membership criteria. Members were contacted regarding any clarifications. I sent out emails to members regarding inclusion into the membership directory and completed an excel spreadsheet with information provided by members for inclusion into the directory.

- Charity Foster

SECRETARY ANNUAL REPORT

Rebekah Walton

2015 Calendar Year

In accordance with the GLPA policies and procedures manual, the following items were completed by the Secretary during the 2015 calendar year:

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

GLPA TREASURER 2015

Terri Marksbury

In accordance with the GLPA Policies and Procedures manual, the following items were completed by the Treasurer during the 2015 calendar year:

- Reviewed records from 2014;
- Deposited all incoming funds/disbursed funds as necessary;
- Prepared budget with periodic updates;
- Prepared monthly treasurer reports;
- Prepared treasurer summaries for newsletters;
- Attended monthly board meetings and CLE luncheons;
- Prepared and electronically filed the 2014 income tax returns;
- Prepared and submitted Kentucky Secretary of State Annual Report
- 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 2016 year.

2015 REPORT OF NFPA REPRESENTATIVES

By: Glenna Fugazzi, RP, NFPA Primary
Mary Campbell, CKP, NFPA Secondary

Region 3 ROCKS and has participated in monthly conference calls with the delegates and Region Director. Our Region has also been 100% reporting to the *Inside* with bi-monthly submissions of activities of the respective associations that comprise Region 3.

The GLPA was able to send the NFPA Secondary Rep to the Region 3 meeting in Indiana in April which was filled with much information to bring back to the GLPA. Unfortunately, the budget did not allow for attendance at the 2015 Annual Conference resulting in the inability to vote on specific agenda topics and/or By-Law amendments.

The GLPA Board submitted an Application to host the 2017 Joint Conference, which was reviewed and discussed at the 2015 Annual Conference by the NFPA Board of Directors. There were only two associations submitting a bid, and the GLPA was not picked. The main reason was the lack of attendance at the Annual Conference. However, we had an excellent application with several board members working tirelessly over the weekend to pull together all the benefits of our lovely city and hosting here in central Kentucky. The Board is excited to submit again for another NPFA event when scheduled to be held on the east coast.

Articles have been prepared and submitted to the GLPA Newsletter Chair throughout the year as requested.

The NFPA Representatives are continually on call to answer questions and monitor email exchanges for issues that affect our profession.

KPA Liaison End of Year Report 2015

It's been an exciting year for the KPA at year's end there were 240 members in the KPA.

The Western Kentucky Paralegal (WKP) hosted their Annual Meeting on May 1, 2015 in Paducah, Kentucky. Throughout the year WKP hosted various CLE's including their October CLE presented by Debra Simon, Esq. who spoke on various forms of bankruptcy available to individuals and businesses. During such CLE members contributed canned goods to be donated to "Soup for the Soul", a local soup kitchen in Murray that feeds approximately 60 individuals daily. On December 1, 2015 WKP hosted their Annual Christmas Party with 10 members present. The members enjoyed a catered meal, as this WKP's "Member Appreciation" month. Five WKP members attended the 2015 KPA Conference and WKP member Lydia Bowlin passed her CKP exam in November, 2015. They plan to host their 2016 Annual Meeting on May 6, 2016 at Renee's in Paducah.

The Northern Kentucky Paralegal Association (NKAP) hosted various CLE's throughout the year with their biggest being their spring seminar on May 30, 2015 hosted at the Beckfield College in Florence Kentucky called "Caring Hand In Hand". The event was focused on advocates of children, legal professional, students, CASA members and CFCRB Members. Speakers included Marianne Stewart who spoke on the overview of "Student/Parent Rights in Special Education", Joshua Crabtree who spoke on "New Face Poverty of in American" and the Northern Kentucky Drug Task Force who spoke on "Drug Addiction in Northern Kentucky and its Effects on the Family." NKAP also had its first Annual Pinstripe Boot Camp on August 22, 2015 which offered services and good to students to prepare them for employment interviewing. NKAP's holiday social was held on December 16, 2015.

The Louisville Association of Paralegals (LAP) hosted various CLE's throughout the year including a luncheon on Mergers and Acquisitions. They continue to do community services by participating in the Waggin Trail Walk and preparing dinner for the Ronald McDonald House and Gilda's Club. LAP also participated in volunteering at the CIPS which include helping with pictures of Pets picture with Santa. LAPs 2015 holiday luncheon was held on December 16, 2015. They continue to release their monthly newsletter, "PARA*Graphs."

The Southern Kentucky Association of Paralegals (SKAP) hosted various CLE's throughout the year such as "Personal Injury/Trucking Litigation", "Criminal Defense" and "What NOT to DO in District Court." On March 28, 2015 SKAP members participated in Kentucky First Lady Jane Beshear's Shop and Share Program at Krogers in Bowling Green, Kentucky. SKAP also hosted its second annual "Paralegals Night Out" at the Bowling Green Hots Rods baseball stadium box event on June 11, 2015. Other events members participated in were "Haunted Walking Tour of Downtown Bowling Green" on October 29, 2015 (8 members) and a CLE presentation on "Code of Ethics Training for Bowling Green City Employees presented by City Attorney Gene Harmon. Also, throughout the year sponsored a personal hygiene drive for BRASS (Barren River Area Safe Space). Lastly, SKAP has agreed to plan and host the 2016 KPA Conference in Bowling Green, Kentucky. Current Membership is 37.

The fall 2015 CKP Exam was administered on Saturday, November 14, 2015 with all 16 applicants passing. There is now a total of 198 Certified Kentucky Paralegals. The next scheduled CKP Exam is to take place in May, 2016.

The 2015 KPA Conference was held at the Clarion Hotel in Lexington this year with 14 vendors.



BOARD-AT-LARGE 2015 YEAR-END REPORT

Fundraising - Sponsors

Action Court Reporters was a GLPA Diamond sponsor in 2015; they, of course, received the benefit of a full page ad in Para-Phrases each quarter. National Corporate Research came on board as an Emerald sponsor in 2015; as an Emerald sponsor, NCR was entitled to a quarter page ad in Para-Phrases each quarter, but when our website went down, the Board voted to give them a full-page ad. Collins Sowards Lennon Reporting came on mid year as a Sapphire sponsor in 2015, entitling them to a business card size ad in the newsletter, but were also given a full page ad due to our website being down. , 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-2015 (\$225). An/Dor Reporting also carried a full page ad for the entire year-2015 (\$225).

Fundraising - Logo Items

Logo items have been greatly depleted. Remaining GLPA logo items in stock include t-shirts, cookbooks, imprinted pen/styluses, thermal totes, and credit-card protectors. The logo items have been turned over to the newly elected 2016 Board-at-Large.

Fundraising – Selling Mums

The sale of fall mums netted the GLPA \$280.

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!

Thank you.

Debra L. Gibby, RP®, CKP
Michelle Stidham
GLPA 2015 Board-at-Large

CLE CHAIR YEAR END REPORT 2015

It was a good year for GLPA. There were great speakers and great topics throughout the year.

Thank you to all the board members who helped me in securing the speakers for the monthly CLE. I really appreciate everyone's help and input. Certificates were handed out to the members who attended the seminars. I attended the monthly board meetings. Obtained food/lunch for monthly CLE lunches and gifts for the speaker. I tried to offer a different variety of cuisines which was very much liked by the members who attended the seminars and got great feedback from board members as well. I also coordinated the half day CLE, which was a success with great turn out.

Here is the list of the speakers and topics for monthly CLE for the year 2015 and half day CLE.

Speakers for monthly GLPA CLE meetings

Speakers	Topic
January – Clair Edwards	Student Loans' effects and bankruptcy
February – Cancelled due to weather	
March – Helen Bongard	Alzheimer's (covers little bit of several areas of law)
April – Pat Maloney	Defending a Medical Malpractice Claim
May - Bonnie Hoskins	Workers' Comp
June – Patsey Jacobs	Trial Preparation
July – Summer Special Event	
August – Stephanie Wurdock	"Legal Sleuthing 101"
September – Kacey Coleman	"Managing Electronic Discovery"
October – Duane Osborne	"Friend of the Court"
November - Josh Salsburey	"Take the high road: Guidance for Ethical Fact Gathering"
December - Award Banquet	

HALF DAY CLE

Terri Mayor - Mergers and Acquisitions; tips to ensure a smooth closing"

Greg Funfsinn – Effective Deposition Preparations

Helen Bongard – Ethics

By Shobha Lakhiani

2015 YEAR END REPORT FOR PHILANTHROPY

Michelle Ralston

As the Philanthropy Chair for 2015, in addition to the activities we do every year, including the blood drive and helping with the Pro Se Divorce Clinic, the GLPA focused on local charities and our service men and women.

For the year 2015, I completed the following as Philanthropy Chair:

1. Attended the majority of monthly board meetings.
2. Attended monthly CLE lunches, as my schedule permitted.
3. Attended the July Anniversary Luncheon and the December Holiday Luncheon.
4. Solicited GLPA members to assist at the Pro Se Divorce Clinics.
5. Assisted with organizing and soliciting volunteers at two (2) blood drives in May and December for the Kentucky Blood Center which resulted in a total of 30 pints of blood being donated.
6. Solicited GLPA members to volunteer and cook dinner for the families staying at the Ronald McDonald House.
7. Collected donations for the Lexington Humane Society totaling over \$60 in cash and numerous items.
8. Collected donations for the Lexington Rescue Mission totaling \$130 in cash and numerous canned items, including additional food items for Thanksgiving.
9. Collected donations for the Nepal Water Missions International totaling \$130 in cash.
10. Collected donation items to be included in Blessing Bags distributed to the Hope Center.
11. Collected and mailed donation items for a Kentucky National Guard unit deployed overseas.
12. Purchased and got GLPA members and others to sign and include personal messages in thank you cards for Honor Flight recipients for the flight held on May 20, 2015.
13. Purchased and got GLPA members and others to sign and include personal messages in Christmas cards that were delivered to local veteran nursing homes for the holidays.
14. Submitted articles to the GLPA newsletter.

JOB BANK CHAIR ANNUAL REPORT

2015

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. Attendance at monthly GLPA board meetings
2. Attendance at monthly CLE meetings
3. Attendance at July and December luncheons
4. Reviewed and posted available positions to the GLPA members via our listserv.
5. Followed up with employers to obtain feedback and see if positions were filled.
6. Worked with the IT chair to make sure that job postings were included on the website
7. Worked with the IT chair during the revamp of our website to make sure that the Job Bank link was easily accessible and visible to all members and potential employers.

-Brian Devinney

NEWSLETTER CHAIR YEAR-END REPORT

In 2015, the newsletters were published quarterly in March, June, September and December. We had the following paid sponsors who received placement in our newsletter: An/Dor (full page), National Corporate Research (full page), Collins Sowards Lennon (full page), and Action Court Reporters (full page). Action Court Reporters was a diamond sponsor and National Corporate Research was an emerald sponsor.

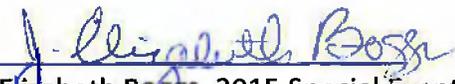
Christy Morgan, CKP
2015 Newsletter Chair

**SPECIAL EVENTS
ANNUAL REPORT
J. Elizabeth Boggs
2015 Calendar Year**

In accordance with the GLPA policies and procedures manual, the following items were completed by the Special Events Chair during the 2015 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) Prepare monthly report and circulate for review prior to the next scheduled board meeting.
- 6) Submit articles for GLPA newsletter.
- 7) Plan, organize and host wine and cheese party for law firms who pay GLPA dues for employees and to encourage those who do not to consider for next year.
- 8) Plan and organize spring social outing at Roller Derby.
- 9) Plan and organize July anniversary lunch which includes obtaining door prizes, preparing program, finding a venue and speaker and taking RSVP's and payment.
- 10) Plan and organize fall social in conjunction with October CLE which was held at Sullivan University. Arrange for bus transportation, door prizes and get to know you activity.
- 11) Plan and organize December lunch which included obtaining door prizes, preparing program, finding a venue, and taking RSVP's and payment.

By:


J. Elizabeth Boggs, 2015 Special Events Chair

2015 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 Morehead and the membership. We only received two applications and the scholarship was ultimately awarded to Shelby Shackelford.

- Heather Purnell

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 2015 calendar year:

- Attended and participated in some GLPA Board meetings;
- Corresponded with GLPA members and NFPA representatives regarding PACE, PCCE, and required CLE;
- Corresponded with paralegals interested in taking PACE exam or PCCE exam;
- Met with four GLPA members to take the PACE online practice exam;
- Insured that the PACE/PCCE information maintained on the GLPA website was current along with the list of GLPA members who are also PACE registered paralegals; and
- Organized the PACE/PCCE exam scholarship drawings for July 2015 and December 2015, which were won by Wayla Todd (July), Rebekah Walton (December), and Stephanie DeWitt (December) (all will take the PACE exam).

2015 PAST PRESIDENT END OF YEAR REPORT

I drafted the 2016 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 2016 Board election form and sent the same to the membership. Two other members were on the committee to send out ballots and tally votes, Janet Mitchell and Melissa Taulbee. All 3 of us received the nominations and votes and compared same. In addition, a second ballot for the IT position was sent out to membership due to a tie in the initial election.

I also drafted the awards nomination form and sent the same to the membership. Janet Mitchell and Melissa Taulbee assisted in gathering and tallying these results. After the results were finalized for awards, Heather Purnell ordered the trophies for the awards.

- Heather Purnell

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 2015 calendar year:

- Attended and participated in some GLPA Board meetings;
- 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;
- After website crashed and was not recoverable, worked with website designer to create new website; and
- Administered website.