



Tulsa Area Paralegal Association

November 8, 2018

***The biggest risk is not taking any risk. In a world that is changing quickly,
the only strategy that is guaranteed to fail is not taking risks.***

Mark Zuckerberg

As TAPA began its 36th year, the new Board of Directors took on the challenge of moving TAPA into a direction that would incite growth and continue our mission of “developing and promoting professional excellence among paralegals,” while meeting the needs of our members in a rapidly changing world.

The most visible change made this year was the format of TAPA’s educational events. Recognizing that our members are busier than ever, we took a risk and decided to try an educational schedule that enabled members to attend fewer events during the year, while making those events more substantial in time and content. We were excited to have put together an interesting mix of creative topics and speakers. The budget was streamlined to allow these events, which included meals, to be completely free to members. Thus, in contrast to years past, members had the opportunity to earn up to 12.75 hours of continuing legal education credit for only the price of the annual dues.

Other highlights from TAPA’s 2018:

- For the third year, TAPA continued its community outreach relationship with the Lindsey House, a local residential home for situationally homeless single mothers. This relationship has been incredibly rewarding for TAPA.
- Nine TAPA members attended the NALA Annual Conference in St. Louis in July. We were there to witness TAPA’s own Cassandra Oliver complete her two-year term as NALA’s President and TAPA member Debra Overstreet elected NALA Secretary.
- Members of TAPA’s Board attended and represented the association at the Association of Legal Administrators Expo in March, the Oklahoma Bar Association’s Annual Meeting, the Tulsa Community College Paralegal Studies Program Career Fair, and the University of Tulsa’s paralegal program’s current class.
- Several TAPA members serve on advisory boards for the TU and TCC paralegal programs.
- Several TAPA members serve on national committees for NALA.
- A craft event was held at a local painting studio to benefit Lindsey House.
- TAPA has become completely paperless, fully utilizing online systems for membership and event registration, email distribution, newsletter updates, and recordkeeping.

Plans are already underway for TAPA’s future, including collaboration with our sister association, Central Oklahoma Association of Legal Assistants, and the development of a leadership training program for paralegals across the state. As TAPA moves toward its 40th birthday, we are devoted to developing the next wave of leadership and fostering growth of our profession in the Tulsa area.

None of these accomplishments would have happened without the enthusiasm and energy of the 2018 Board. This is a team of hard working, intelligent, dedicated, selfless, diverse, creative, and fun women that have become a cohesive unit devoted to serving our association.

It has been an honor and a pleasure to serve TAPA and you, the members, this year.

A handwritten signature in blue ink that reads "Lisa M. Stone". The signature is written in a cursive, flowing style.

Lisa Stone, ACP
President

To: Lisa Stone, TAPA President

From: Christian Chicas, TAPA First Vice President Membership

Date: November 8, 2018

Re: Membership Year End Report

Membership: TAPA had a total of 92 members in 2018. We had 59 renewals, 9 new members, 9 student members, and 9 sustaining members. There were 6 members who had been members in the past, but were not members in 2017. The membership fees remained the same at \$70.00 for active members and \$25.00 for student members.

TULSA AREA PARALEGAL ASSOCIATION



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2018 ANNUAL REPORT BY SECOND VICE PRESIDENT OF EDUCATION

TAPA has provided a total of 12.75 hours of continuing legal education for 2018. TAPA's Second Vice President of Education, Jennifer Arnold, along with members of the Board secured a variety of speakers and topics for the year. This year we decided to mix it up a little bit and try something different. Instead of charging our members for each seminar they were allowed to attend for free as long as they had paid their membership dues. We also provided food and drinks at every event. We hope that our members enjoyed this year's slate of speakers and we hope to provide some great ones next year. If any members have any ideas for topics, speakers or locations I would be glad to hear them, you can contact me any time. Any feedback from our members is greatly appreciated. Thank you for allowing me to serve as your Second Vice President of Education for the year, 2018.

- February 26, 2018 TAPA Winter Seminar
"The First Amendment, Social Media & Media Law: On the Front Lines"
Speaker: Robert "Bob" Nelson, Hall Estill
2.0 hours of CLE
36 attendees
- April 14, 2018 TAPA Spring Seminar
"Survive and Thrive in Your Workplace"
"Communication Styles and Communicating With Your Attorney"
Speakers: John David Lackey, Esq., Paul & Lackey, P.C.;
Lisa Stone, ACP
- "Sexual Harassment in the Workplace"
Speaker: Chris Thrutchley, Esq., GableGotwals
3.5 hours of CLE
29 Attendees
- June 25, 2018 TAPA Summer Seminar
"Deferred Action for Childhood Arrivals (DACA)"
Speaker: Marvin Lizama, Lizama Law
1.5 hours of CLE
25 Attendees

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- Sept. 15, 2018 TAPA Fall Seminar
 “Courthouse Justice”
 “Working with a Professional Private Investigator”
 Speakers: Gary Glanz & Chris Cleath, Glanz & Associates
- “Forensic Science: The Real CSI”
 Speaker: Kelly Borycki, Tulsa Police Department
- “Keeping the Courthouse Doors Open to Everyone – The
 Courthouse Access/Assistance Program”
 Speaker: Elizabeth Nellis, ACP
 4.0 hours of CLE
 26 Attendees
- November 8, 2018 Annual Meeting
 “The Investigative Game: The Case of the Man Cave”
 Speaker: Leah Wietholter, Workman Forensics
 1.75 hours of CLE

Respectfully Submitted,

Jennifer Arnold, ACP
Second Vice President, Education

TREASURER'S ANNUAL REPORT TO TAPA MEMBERSHIP

Checkbook balance from December 31, 2017	\$	5,910.11
Income received for dues and seminar registration fees to date	\$	5,991.85
Checks written for operating expenses to date	\$	6,281.77
Checkbook balance as of October 20, 2018	\$	5,715.19

I hereby certify that the foregoing is a correct statement of money received and disbursed by me during this period and the total checkbook balance at the end of this period is correct.

/s/ Tracy Mosz
Tracy Mosz, TAPA Treasurer

November 6, 2018
Date

COMMUNICATIONS ANNUAL REPORT FOR 2018

The Communications Officer is responsible for communications to the membership, promoting and maintaining TAPA's electronic media presence, public relations, and managing the Association's publications.

In 2018 TAPA continued to use its updated methods for communicating with members and others, both to stay current with social media and communication trends and to ensure professionalism and consistency in how our association is represented. While this new digital format in 2017 was a bit of an adjustment for some, in 2018 the members seemed to be adjusted and even embrace the updated format.

Eventbrite

TAPA continued to use Eventbrite for all of its registrations. This has allowed us easy online records as well as the ability to safely accept credit card payments in compliance with the Payment Card Industry Data Security Standards. Depending on what is the best method for members, they may still register online and choose to mail a check for their payment.

Job Bank

Between January 1 and October 16, 2018, 27 paralegal positions were posted the Job Bank on the TAPA website and distributed to members. This is up from 20 posted paralegal positions in 2017.

Website

The TAPA website (www.tulsaparalegals.org) is the central hub of information about the association. The website provides a calendar of events, the Board of Directors and their contact information, TAPA's governance documents, and a form for visitors to contact TAPA with questions or inquiries. Social media and email announcements regarding membership, events, newsletters, and Job Bank postings all link back to the website. In 2018, the website had an average of 1,916 visits per month.

TAPA Blog

In 2017 TAPA replaced its quarterly newsletter with a blog (www.tulsaparalegals.wordpress.com). Lisa Stone continues to write great posts and find paralegal relevant articles to post. These articles are also linked to the TAPA Facebook and LinkedIn pages. In 2018 we had 6 posts and 1,364 views. This averaged to 136 views per month in the first 10 months of 2018.

Social Media

TAPA's Facebook page currently has 289 "followers," which is a 15% increase from last year. The page is a public group page, which means that followers do not have to have a Facebook profile of their own in order to view the page. Relevant articles and other items were posted throughout the year to encourage discussion and participation by members and followers.

TAPA is continuing to build its newer LinkedIn presence. There are currently 22 followers on LinkedIn. We have had 8 posts, and one of our posts had as many as 744 "impressions." TAPA averages about 332 "impressions" per post. This is outstanding for a newer page.

Email

TAPA continues to use MailChimp for distribution of mass emails this year. This free program has improved the layout and appearance of our emails, thus giving TAPA's communications a more professional appearance. It has also enabled us to maintain more accurate distribution lists.

I have enjoyed serving as the Communications Officer and tag-teaming with Lisa Stone to make TAPA a valued resource for paralegals. This resource assists paralegals to know what is happening within TAPA and in the broader legal community.

Julianna Adams, ACP
Communications Officer
October 16, 2018

TULSA AREA PARALEGAL ASSOCIATION
NALA LIAISON
November 8, 2018

St. Louis Conference Honors –

- James J. Proszek, J.D., of Hall Estill (Tulsa), awarded the Founders' Award at the St. Louis Conference.
- Cassandra Oliver, ACP awarded Presidential Honorary Lifetime Membership.
- Debra L. Pascoe, ACP awarded Honorary Lifetime Membership.

The Certifying Board of NALA has made changes to the CLE Requirements effective January 1, 2019.

- You are now able to receive CLE for published articles and selected articles in Facts & Findings.
- The automatic one-year extension to meet recertification requirements will no longer be provided to Certified Paralegals, you will receive a courtesy reminder one year prior to the expiration date. Please keep your recertification deadline on your personal and work calendar (if possible). You have worked too hard to have your certification revoked.

TAPA members continue to play an active role on the NALA Board of Directors and Committees:

- Debra Overstreet, ACP - Treasurer
- Lisa Stone, ACP – Certifying Board
- Christian Chicas, CP – Ethics Committee
- June Brown, CP - Continuing Education Council (CEC)

The biggest shift for NALA has been the administration of the CP examination. Please go to the link to understand the examination format and share with new paralegals.

<https://www.nala.org/sites/default/files/files/users/NALA%202018%20CP%20Exam%20Announcement.pdf>

NALA leads the paralegal profession by providing a voluntary certification program, continuing legal education, and professional development for all paralegals.

NALA Mission Statement

Respectfully Submitted,

June E. Brown, CP
TAPA Liaison
The University of Tulsa

2018 TAPA Charity Committee Report

TO: TAPA Members

FROM: Jaime McKay, Charity Committee Chair

DATE: November 5, 2018

This year TAPA donated 13 baskets full of personal items and goodies to the mothers for Mother's Day. TAPA members donated items and money for this service project. This is the third year TAPA has done this and Lindsey House has become to rely on TAPA to help make this day special for the mothers.

Lindsey House had their first clothing sale on July 21st at the Oklahoma Jazz Hall of Fame. Several TAPA members donated items for the sale, we had three members volunteer and worked the sale and a few member shoppers. This was an easy way for TAPA to help the Lindsey House.

Coming up on November 17, from 2:00-5:00 P.M. TAPA is hosting an event for Lindsey House at Vogue Wood & Brush Studio. A portion of the proceeds from this event will go directly to Lindsey House. TAPA will be providing snacks for all attending members and their friends and family.