

## PRESIDENT'S REPORT

I am sure you will agree with me that the year 2016 offered surprises, challenges, and opportunities for growth.

This year, while membership numbers increased, the TAPA board recognized that it is the individual paralegal, serving in the community of Tulsa and surrounding areas, that is the driving force behind our mission statement. Consequently, using LEAP's (Leadership Enhancement And Preparation) suggestions for amazing Associations, surveys were sent to our members, both sustaining and individual, to find out how TAPA can better serve paralegals. Over 33% of our members responded! TAPA's elected board then set about to incorporate the requested changes and ideas. We offered CLE at breakfast, after work, as well as our typical downtown lunch meetings. Our VP of Education, Gloria Jones and her hard-working committee, came up with new exciting speakers and CLE opportunities. We changed the venues so paralegals from north to south Tulsa and many places in between could more easily attend. Happy Hours and Family Days were included to assist with networking. Because PCI compliance is important to our members and board, we researched different options and have incorporated Eventbrite in our fall seminar and Membership Appreciation Dinner. As community outreach is important to TAPA, our VP of Membership, Jaime McKay, was also able to garner support for the Lindsey House to a tune of over \$3,300 for its back-to-school project.

All of the above, and more, was accomplished because of dedicated TAPA members, who believe in giving back. Thank you to this year's board for their sacrifice of time, money, and energy as we all worked together as a team to develop and promote professional excellence among paralegals in the Tulsa area through innovative, continuing legal education programs and a mutually supportive network.

Your continued sacrifice and dedication helps make TAPA the ongoing legacy that it is for generations of future paralegals.



*Michelle Maxwell, ACP*

*TAPA President*

**To:** Michelle Maxwell, TAPA President

**From:** Jaime McKay, TAPA First Vice President Membership

**Date:** October 28, 2016

**RE:** Year End Report

**Membership:** TAPA had a total of 104 members this year. 77 renewals, 12 new members, 10 student members and 5 sustaining. The membership dues were raised to \$70.00 this year for members and \$25.00 for students.

**Charitable Work:** TAPA committed to helping Lindsey House this year. At the Spring Seminar we took donations for personal items for the mothers of Lindsey House. We prepared 12 baskets and presented them to the mothers for Mother's Days. All of the mothers responded with thank you cards.

In August we held a Back to School Bash at Lindsey House and presented the staff with \$3,300.00 (\$300.00 from Summit Recruiting, \$1000.00 from TD Williamson and \$2,000.00 from Matrix Service Company) to help assist with back to school supplies and clothing. TAPA provided breakfast and read with the children. Debra Cox with Summit Recruiting brought Nala, the therapy dog and read with the kids as well. We had 2 TAPA board members and 3 members attend. In total there were about 32 people including kids, mothers and staff from Lindsey House.

**TAPA 2016 MEETING & CLE REPORT**  
**Submitted by Gloria S. Jones ACP, TAPA Second Vice President**

<b>Date</b>	<b>Title</b>	<b>Speaker</b>	<b>CLE</b>	<b>Location</b>	<b>Attendance</b>
1/13/16 7:30 am	What Everyone Needs to Know About Wills & Trusts	Kara Greuel, J.D., CPA/CFF/CGMA, CFE	1.0	CCK	14 members 8 guests
2/10/16 Noon	December 2015 Amendments to the Federal Rules of Civil Procedure and How These Changes Impact Discovery Disputes	Brita Cantrell, McAfee & Taft	1.0	ONEOK	20 members 5 guests
3/8/16 5:30 pm	Fighting for Their Rights: Leveling the Playing Field: Obergefell v. Hodges	Marvin Lizama, Attorney	1.5	Tulsa Historical Society	28 members 1 guest
4/30/16 Spring Seminar (Saturday AM)	“Career Development and Professionalism in the Workplace- With Guidance on Staying Marketable and Ethical  “(1) Motion Hearings: Use of Theory and Themes, and (2) Trials: Courtroom Professionalism; Presenting Issues; Marshaling Evidence; Examining Witnesses”	Cassandra Oliver, ACP (NALA First Vice President and President-Elect) & Elizabeth Nellis, ACP (NALA Region IV Director)  M. Shane Henry, Esq. & Aaron D. Bundy, Esq. with Fry & Elder	2.0 (1.0 Ethics)  2.0	CCK	32 members 4 guests
5/11/16 Noon	The Ins and Outs of the County Clerk’s Office	Pat Key, Tulsa County Clerk	1.0	ONEOK	21 members 7 guests
6/8/16 5:30 pm	Cybersecurity	Tom Vincent, GableGotwals	1.5	Hardesty Library	31 members 4 guests

<b>Date</b>	<b>Title</b>	<b>Speaker</b>	<b>CLE</b>	<b>Location</b>	<b>Attendance</b>
8/10/16 Noon	Indian Law	Christina Vaughn, Crowe & Dunlevy	1.0	ONEOK	17 members (2 new) 1 guest
9/14/16 7:30 am	Small Claims	Judge Millie Otey, Tulsa County District Court	1.0	Tulsa Historical Society	23 members 2 guests
10/29/16 Fall Seminar (Saturday) 7:45 am – 2:30 pm	Litigation (Session 1): Investigation, Pleadings, Discovery and Expert Witnesses  Litigation (Session 2): Motions, Settlement Negotiations (and Arbitration), Trial Preparation and Trial  E-Discovery to Trial Presentation	Bradley J. Beehler, Morley Law Firm, Ltd., Grand Forks, ND    Charlotte Blacklee, Litigation Support Manager, Crowe Dunlevy, Oklahoma City	4.0    1.0	Gilcrease	38 registrants 2 guests
11/10/16 5:30-8:00 pm	Top Ten Most Memorable Mistakes In A Legal Career...And What We Can Learn From Them	Angelyn Dale, Hall Estill	1.0 (Ethics)	Gilcrease	
12/7/16	Life Lessons from a Law Degree	Jill Donovan, Attorney & Owner Rustic Cuff		ONEOK Auditorium	

Respectfully submitted,  
Gloria S. Jones ACP  
TAPA Second Vice President

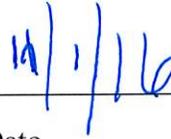
**TREASURER'S ANNUAL REPORT TO TAPA MEMBERSHIP**

Checking account balance from December 31, 2015	\$9189.53
Income received for dues, seminar registration fees	\$8880.38
Checks and debit transactions for operating expenses to date	\$8906.48
Checking account balance as of October 31, 2016	\$9163.43

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



Teri Helland, TAPA Treasurer



Date

## **Communications Annual Report for 2016**

The Communications Officer position was a new Board of Directors position in 2016, as a result of the September 9, 2015 revisions to the TAPA Bylaws. Duties that were previously spread over multiple positions now fall under the Communications Officer position, including responsibility for communications to the membership, promoting and maintaining TAPA's electronic media presence, public relations, and managing the Association's publications.

### **Communications to the Membership**

A major change that was made this year was the creation of an email account, [tapa@tulsaparalegals.org](mailto:tapa@tulsaparalegals.org), from which all communications to the membership are sent. This account has provided consistency in branding, distribution and content in communicating with our membership and external contacts. This also gives the members one contact to which they may address questions and other inquiries.

### **Job Bank**

Between January 1 and October 31, 2016, thirty (30) jobs were posted to the Job Bank on the TAPA website and distributed to members.

In August 2016, the Board voted to implement a policy regarding the nature of positions that are posted in the Job Bank. It was decided that only paralegal or hybrid paralegal positions will be posted. Requests for the posting of secretarial or administrative assistant positions will be referred to other organizations. The creation of this policy was the result of feedback from the membership.

### **Website**

The TAPA website continues to be our central and primary method of communication about our Association. Social media and email announcements regarding membership, events, newsletters, and Job Bank postings all link back to the website. In 2016, the website had an average of 1,977 visits per month, which is an 11% increase from last year.

### **Social Media**

TAPA's Facebook page currently has 198 "followers," which is a 16% increase from the beginning of the 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. In addition to using Facebook to advertise and publicize all TAPA events, we also utilized it to post "Facebook Live" videos promoting the Fall Seminar. Relevant articles and other items

were posted throughout the year to encourage discussion and participation by members and followers.

### **Newsletter**

Three quarterly newsletters were published this year and included articles, event photos, announcements, Board member profiles, and sustaining member advertising. During this year the National Association of Legal Assistants (NALA) began publishing affiliate association newsletters on its website, which means that the TAPA newsletters are now available to anyone visiting the NALA website.

### **Surveys**

In February 2016, the Board conducted an online survey of the membership that sought feedback on membership, meetings, and CLE topics, and included a place for general comments. The Board was very pleased to have about a 40% response rate, which is well above the normal average for responses to such surveys. The Board reviewed and analyzed the results, including the very constructive comments that were received, and worked hard to consider those suggestions this year.

A survey was also conducted of the Sustaining Members and those responses will be incorporated into future relationships with our valued Sustaining Members.

It was a pleasure to serve the TAPA members this year as Communications Officer. Our Association has an exciting future, including celebrating its 35th anniversary in 2017 and other potential changes to our processes that will further serve our members in our rapidly changing world of media, technology and communications.

Lisa M. Stone, ACP  
Communications Officer  
October 31, 2016