

## 2017 ANNUAL REPORT BY TAPA'S PRESIDENT

**MY GOALS AND THEME FOR 2017:** This year is TAPA's 35<sup>th</sup> anniversary. For that reason, my theme for the year was "Honor the Past, Celebrate the Present, Prepare for the Future – and Have Fun!" I also wanted to strengthen TAPA's future through implementation of updated processes and communications technology.

Your TAPA board accomplished the following goals this year:

- Offered 14 hours of CLE for our members
- Posted 20 open paralegal position to the Job Bank on the TAPA website
- Continued to support Lindsey House
- Membership and seminar registration via Eventbrite
- Email distribution to the members via Mail Chimp
- Posted 23 articles relevant to the paralegal profession with a Blog by Lisa Stone
- Posted the blog articles and event notifications on TAPA's facebook page
- Communications by and between board members via GroupMe app
- Scanning and uploading all present and historical TAPA business documents to DropBox
- Joint seminar with OPA
- Several members represented TAPA at the annual NALA convention in Orlando
- Represented TAPA at the Tulsa Legal Expo
- Shared booth at the OBA convention with TCBA, NALA, COALA and OPA
- Several TAPA members sit on advisory boards for the paralegal studies programs at the University of Tulsa, Tulsa Community College, and Community Care College
- Several TAPA members serve on the NALA Board of Directors or on a NALA Committee
- TAPA's 35<sup>th</sup> anniversary celebration on November 9, 2017 with live music, dinner, cocktails, door prizes and entertainment

Respectfully submitted,

Tracy Mosz, ACP  
President, Tulsa Area Paralegal Association  
Brewster & DeAngelis  
2617 E. 21<sup>st</sup> Street  
Tulsa, OK 74114  
[tmosz@brewsterlaw.com](mailto:tmosz@brewsterlaw.com)

**To:** Tracy Mosz, TAPA President

**From:** Julianna Adams, TAPA First Vice President Membership

**Date:** November 7, 2017

**Re:** Membership Year End Report

**Membership:** TAPA had a total of 91 members in 2017. We had 15 new members, 10 student members, and 5 sustaining members. There were 10 people who joined who had been members in the past, but were not members in 2016. The membership fees remained the same at \$70.00 for active members and \$25.00 for student members.

**Charitable Work:** TAPA continued to support the Lindsey House this year. TAPA members brought donations of personal care items to the Spring Seminar. These donations were put into 14 Mother's Day gift basket for each mom at the Lindsey House. The moms were very grateful and each wrote a thank you card. In addition to the personal items, TAPA also collected reams of copy paper for the Lindsey House.

TAPA decided to adopt one family from the Lindsey House for Christmas. At the 35<sup>th</sup> Anniversary Party, we will collect monetary donations from the attendees. Jaime McKay will use the donations to purchase the items on our assigned family's wish list.

## **2017 ANNUAL REPORT BY SECOND VICE PRESIDENT OF EDUCATION**

TAPA's Second Vice President (Education), Terri Cooper, has secured an interesting and diverse slate of speakers for our monthly membership meetings and spring seminar. TAPA has provided a total of 14 hours of continuing legal education for 2017.

- January 11, 2017      “Culling/Search Techniques to Reduce E-Discovery Review Time”  
Brian Grossman and Luke Harris, Litgistix  
1.0 hour of CLE  
13 attendees
- February 15, 2017      “Mobile Device Forensics”  
Gavin Manes, Ph.D., Avansic, Inc.  
1.0 hour of CLE  
23 attendees
- March 8, 2017      “Social Security Disability Insurance Claims”  
Gwen Latus, Office of Public Affairs, Social Security Administration  
1.0 hour of CLE  
20 attendees
- April 8, 2017      Spring Seminar (TAPA and Oklahoma Paralegal Association)  
4.5 hours of CLE  
40 attendees
- “Child Abuse and the Duty to Report”  
Pat Cantrell, Esq., Oklahoma State Health Department
- “Nuts & Bolts of the Program and Therapy Team”  
Debra Cox and Sally Van Schenck, Victim Witness Advocates, and therapy  
dog Nala
- “Forensic Toxicology in Criminal and Civil Litigation”  
Jarrad Wagner, Ph.D., F-ABFT, School of Forensic Sciences, OSU Health  
Sciences Center
- “Human Trafficking”  
Whitney Anderson, Unveiled Training & Consulting
- May 11, 2017      “Ethical Dilemmas in the Law”  
Jody Nathan, Esq., Stauffer & Nathan  
1.0 hour of CLE  
18 attendees
- June 14, 2017      “Recapping the Spring 2017 Legislative Session”  
Chanteau Orr, Esq., Tulsa Health Department  
1.0 hour of CLE

18 attendees

August 10, 2017 “How Technology and Social Media Has Drastically Changed the PI Industry”  
Gary Glanz, President of Gary Glanz & Associates  
1.0 hour of CLE  
17 attendees

September 13, 2017 “An Overview of Oklahoma Automobile Insurance”  
Jon Starr, Esq., McGivern & Gilliard  
1 hour CLE  
14 attendees

October 9, 2017 Fall Seminar  
2.5 hours of CLE  
16 attendees

“The Basics of Estate Planning”  
Tracey Garrison, Esq.

“Forming Business Entities”  
Russ Jacobson, Esq.

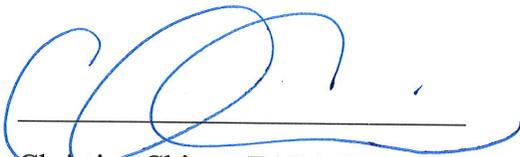
Respectfully submitted,

Terri Cooper, CP  
2<sup>nd</sup> Vice President, Education

**Treasurer's Annual Report to TAPA Membership**

Checking account balance from December 31, 2016	\$8,793.41
Income received for dues, seminar registrations fees	\$7,196.55
Checks and debit transactions for operating expenses to date	\$7,946.18
Checking account balance as of October 31, 2017	\$9,381.94

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.

  
\_\_\_\_\_  
Christian Chicas, TAPA Treasurer

11-5-17  
Date

## COMMUNICATIONS ANNUAL REPORT FOR 2017

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 2017 TAPA continued to update its 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.

### **Eventbrite**

This year, TAPA converted all of its registrations for membership and events to an online system. This has enabled TAPA to keep more accurate records of membership and transactions, handle event check-ins in real time, and decrease the inefficiency of manual payment processing. Using an online registration system has ensured that TAPA is compliant with the Payment Card Industry Data Security Standards, by protecting confidential credit card and payment information.

Eventbrite also allows TAPA to continue to accept cash and check payments, which enables our members to choose their best payment option.

### **Job Bank**

Between January 1 and October 31, 2017, twenty (20) paralegal positions were posted the Job Bank on the TAPA website and distributed to members.

### **Website**

The TAPA website ([www.tulsaparalegals.org](http://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 2017, the website had an average of 1,857 visits per month.

### **TAPA Blog**

In 2017 TAPA replaced its quarterly newsletter with a blog ([www.tulsaparalegals.wordpress.com](http://www.tulsaparalegals.wordpress.com)). The blog enables TAPA to post information about upcoming events, announcements, feature articles, photos and videos, and other information in real time. The blog can be accessed through both desktop browsers or on mobile device platforms. Blog posts are linked to the TAPA Facebook page and on LinkedIn, which has increased traffic to the blog. Since the blog's initiation on April 1, 2017, there have been 23 posts and 1,539 views.

### **Social Media**

TAPA's Facebook page currently has 250 "followers," which is a 21% 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. Relevant articles and other items were posted throughout the year to encourage discussion and participation by members and followers.

### **Email**

TAPA began using 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.

It was a pleasure to serve the TAPA members this year as Communications Officer.

Lisa M. Stone, ACP  
Communications Officer  
November 6, 2017