LAW FIRM LIFE AFTER COVID-19

ACCESSIBILITY FOR ALL

ANNUAL CONVENTION EXHIBITOR PROFILES
President’s Message

CRP IS 10 YEARS OLD! CAN YOU BELIEVE IT?

In my early days of being introduced to NFPA, I learned about credentialing. At the time, I had some practical experience and I had earned a paralegal certificate from a local program. I’m not sure I even knew there were designations for paralegals! I certainly didn’t realize how I could move my career even further by getting a designation. Once I learned more, I knew that was the path I wanted to take.

The thought of taking PACE was terrifying. I spoke to several respected NFPA members and decided I would take the PCCE which was about to be rolled out. Interestingly, there would only be 12 testing sites across the country so I knew that I would most likely have to drive somewhere (and Texas is a BIG state!), get a hotel, etc., to take the exam.

The test would be manual and would use scantron cards. The test results would take between 1-3 months (oh the waiting!!). The study manual had not yet been released. We weren’t even sure how to study for it because no one had taken the test!! We didn’t have any idea how the test questions would be phrased.

While most of the studying I did was on my own, the study group gave me accountability and resources. There was always someone to go to when I had questions. We all seemed to have different backgrounds and helped each other out in our specific areas of expertise. I really recommend you seek out a study group or at least a study buddy to help you if you are considering sitting for either the PCCE or PACE.

they would be multiple choice and we knew the general subjects it would cover.

Luckily for me, in my local association (Dallas Area Paralegal Association, DAPA), a study group was formed. Thank you, Cindy Welch, RP®! Cindy held weekly study gatherings where we discussed areas, topics, and potential pitfalls of the exam. We created flashcards and mini quizzes. We studied in person and even by Skype. We were so advanced back then! We didn’t have Zoom and Skype really only worked about 85% of the time.

Recently, NFPA held a special election to fill two vacant leadership positions. We are pleased to announce that Josie A. Estes has been announced as President Elect and Kelli M. Smith, CRP™ has been elected Region II Director.

JOSIE A. ESTES

Josie A. Estes is employed by Frasca & Frasca, PA in Nashua, New Hampshire where she works in several areas of law, including Probate, Estate Planning, Real Estate, and Business formation.

Josie graduated with an Associates of Science degree in Paralegal Studies in 2011, joining the Paralegal Association of New Hampshire (PANH) soon after. She served on various committees for the PANH as well as serving on their Board of Directors as Secretary, Vice President, and Primary Representative to NFPA.

Josie has previous experience serving on NFPA in various leadership roles over the past 10 years as Secondary and Primary Delegate, Region V Director, Membership Coordinator, CLE Coordinator, Internal Marketing Coordinator, Budget Committee, and Strategic Planning Committee.

Josie currently participates on the Paralegal Advisory Committee for the Paralegal Studies Program of Nashua Community College, in Nashua, New Hampshire.

During her tenure as President-Elect, Josie would like to have a conversation with the leaders of each individual NFPA Association to discuss how NFPA can best advocate for them. She feels that the leaders of NFPA and the leaders of the NFPA Associations can continue to learn from one another.

As the President-Elect Josie will work closely with the NFPA President learning the responsibilities of the position to ensure continuity for the Association. At the 2022 NFPA Annual Convention Josie will be appointed President to serve a two-year term (2022-2024), upon conclusion of her term as President, Josie will become NFPA’s Board Advisor for the following two years (2024-2026).

KELLI SMITH

Kelli Smith was born in South Louisiana and moved to Dallas, Texas in the early 1970’s. From a very early age she always knew she wanted to be in the legal field in some capacity. She brings a comprehensive background coupled with numerous years of legal experience to the National Federation of Paralegal Associations (NFPA). Kelli is a Senior Paralegal in the Legal Affairs Division of Hilltop Holdings, a diversified Dallas-based financial services company, and one of the largest retail banking holding companies in Texas.

HAPPY ANNIVERSARY PCCE!!!!

Don’t be afraid to challenge yourself! Take charge of your career and sign up to take either the PCCE or PACE! If I can do it, you can too!! What will you do to further your career? Start planning today!

Lisa Lynch, CRP™, CEDS
NFPA President
Kelli obtained her AAS in Management from Eastfield College in 2006, and in 2011, was one of the first 148 paralegals in the nation to pass the Paralegal CORE Competency Exam™ pilot test. Only sixteen (16) Texas paralegals passed the exam earning the CRPTM credential. In 2013, Kelli was the recipient of the Dallas Area Paralegal Association’s ("DAPA") Paralegal of the Year Award. Kelli is also a member of the State Bar of Texas - Paralegal Division.

Kelli has been a member of DAPA since 2008, serving on the Board of Directors since 2011. She has held various board positions within the association including Vendor Advisor, Professional Development Director, Director-at-Large, Membership Vice President, NFPA Primary and Secondary Representative, Education Vice President, Treasurer, President-Elect, President, and Board Advisor.

Kelli has also served on numerous committees during her tenure with DAPA including the Elections Committee, Scholarship Committee, Mentor/Protégé Committee, Paralegal Day Committee, Holiday Luncheon Committee, Nominations Committee, and Membership Committee. NFPA committees and coordinator positions held include the Annual Convention Planning Committee and Bylaws Committee, Marketing Coordinator, Association Management Coordinator, and NFPA’s Ethics Board.

Kelli is a 20-year veteran and Co-Chair over nearly 200 Corporate Venue Volunteers at the PGA Byron Nelson Golf Classic, volunteering on behalf of the Salesmanship Club of Dallas, a non-profit organization dedicated to enriching the quality of life of young people through education and mental health services.

The Region Directors are the main liaison between members associations and other members of the NFPA Board. The Region II Director serves Central and Mountain West states.

### Celebrating Credential Holders

**PCCE™**

- Amanda Judd, Jordan, Minnesota
- Wendy Greene, South Charleston, West Virginia
- Richard Garcia, Everett, Washington
- Sarah Calcagno, Champaign, Illinois
- Ashanti Wallace, Leander, Texas
- Shelby Lott, Mt. Pleasant, South Carolina
- Cristina Amaro Renteria, Richardson, Texas
- Inna Taboada, Lake Zurich, Illinois

**PACE®**

- Victoria Buchholz, Lindenhurst, Illinois
- Haley AlderseBaes, Antioch, Illinois
- Elizabeth Butler, Arcadia, Florida

- Sharon Gisson, Lake Oswego, Oregon
- Regina Flint, Greenville, South Carolina
- Christina Jack, Indianapolis, Indiana
- Jennifer Heinzelman, Indianapolis, Indiana
The National Paralegal Reporter has come a long way, from setting quarterly themes to being an open topic publication. The Editorial team looks forward to creating this quarterly magazine as a captivating source of information that is free from bias while growing our profession and proving that the paralegal profession is the best!

The work of the team is tremendous and noteworthy as we aim to provide a platform to inform our readers of the advancement of the paralegal profession, the achievements of NFPA members and the many opportunities we have yet to achieve together.

Through the National Paralegal Reporter, paralegals have the opportunity to make important contributions to the profession and legal community. Your ability to share information and experiences benefits others and makes this publication relevant. Our outreach for articles and content allow us to meet our goals and maintaining knowledge and industry trends. When we make a connection, we share enthusiasm and inspire others. When you read about someone sharing their life lessons or career experiences, it will shape another’s profession career and make an impact. You can make an impact!

We hope that this issue will have an impact on the growth of your professional career and encourage you to make an impact on others. Choose to be a positive influence on others in a way that could improve or change their lives.

In this issue:
- Region I Director Brenda Cothary writes about the latest surrounding the Washington State Limited License Legal Technician program and the impact it has made and barriers it faced.
- A law firm manager shares her insight on the law firm life after the pandemic and how it impacts operations and how personnel can lead their teams.

On behalf of the Editorial Committee, thank you for your contributions. We look forward to strengthening and building on experiences to bring our readers an engaging and relatable publication.

This fall, NFPA will host its very first hybrid event. Our friends and 2021 convention host, the Oregon Paralegal Association volunteer their time to plan Convention for many years and showcase their city and the convention program. They’ve become experts at planning and were able to commemorate change by adjusting to the current lifestyle. We also share tips on how to network during a hybrid event. Maximizing and adapting to the differences between either platform enhances your engagement experience. Their planning makes us believe anything is possible and impact our ability to network and learn together. It’s not too late to register for Convention, don’t wait and join us.

Come visit us at the NFPA booth during convention and purchase exclusive NFPA branded merchandise (see image below). Limited quantities available.

BE WELL. TAKE CARE. LIVE ALOHA.

RONELL B. BADUA, AACP
DIRECTOR OF MARKETING
LLLT Update in Washington State

By Brenda Cothary

On June 5, 2020, the Washington State Supreme Court voted to sunset the Limited License Legal Technician (LLLT) program in Washington State. The LLLT program was adopted by the Supreme Court in late 2012 and was launched in 2015. Although the program got off to a slow start, recent reports indicate the number of those enrolled in the program and those preparing to begin the practice area specific classes are beginning to reach estimated projections.

Several factors contributed to the program’s slow start. These included lack of financial aid opportunities for students, lack of community colleges offering the approved curriculum, and applicants needing to obtain the required education and work experience prior to entrance into the program.

The original reasons for sunsetting the LLLT program were the high costs associated with maintaining the program and the low interest in becoming licensed as a LLLT. However, the LLLT program has been and continues to be a success for the Washington legal profession. LLLT’s provide competent limited legal assistance and increased access to justice for those who would otherwise go without legal assistance. In addition, jurisdictions across the United States and Canada are implementing and exploring limited license programs in their jurisdictions, based on Washington’s model.

Currently 17 states are exploring limited licensing or have implemented limited licensing programs. In addition, five Canadian Provinces have implemented or are exploring implementation of a limited licensing program.

HIGH COST TO MAINTAIN THE PROGRAM

The Supreme Court cited the high cost of administering the LLLT program as the primary reason for its decision to sunset it. One of the key factors in the high cost was the way in which the Washington State Bar Association (WSBA) allocated staff member’s time to support the program. Recently, changes were made to allocate middle and upper management staff time differently, which resulted in projected cost savings to the LLLT program. In addition, changes were made to the way the licensing of the program was managed through the WSBA, which created additional cost savings.

Over five years, the LLLT program cost $1.3 million dollars, which is approximately $200,000 per year. When that cost is broken down, per attorney at the WSBA, the cost is approximately $7 per attorney per year. The WSBA is unique in that it is both the regulatory agency for attorneys, as well as their trade association. The payments that attorneys make to the WSBA cover both their trade association dues as well as regulatory fees. In addition, the WSBA has had a vocal group of attorneys who have been opposed to the LLLT program since before its inception. They see the program as stealing potential clients and they are angry that their payments to the WSBA subsidize such a program.

In addition to these factors, members of the WSBA further restricted the program when they declined to allow the LLLT program to use WSBA technology for the LLLT practice area curriculum, when the technology was available and accessible. Instead, the LLLT Board had to look to other sources for assistance. In addition, once LLLTs were allowed to join the Family Law Section of the WSBA, the attorneys of the section created a new family law group that only attorneys could join.

Finally, the Supreme Court, who first pushed for the limited license in Washington State, became its own worst enemy. As expected, there was turnover in the Court throughout the years. Justices who previously supported the program either retired or were voted out of office, leaving those who were no longer proponents of the program. As the composition of the Court changed, there was less and less support for the LLLT program.

FINALLY, THE SUPREME COURT, WHO FIRST PUSHED FOR THE LIMITED LICENSE IN WASHINGTON STATE, BECAME ITS OWN WORST ENEMY.

The lack of support can be evidenced by the Court’s repeated denial of expanding practice areas. In 2017 the LLLT Board proposed two new practice areas: elder law and health law; in 2020 the Board proposed expanding into administrative law and eviction and debt. On both occasions, the Court was resistant and failed to approve the expansion of practice areas. The result was two-fold.

First, by limiting LLLTs to just practicing family law, they limited the pool of potential candidates to enter the program. Many potential LLLTs who were anticipating practicing in something other than family law, had no other alternative. This also limited the amount of revenue for the program because those who were awaiting additional practice areas didn’t join the program and thus the WSBA didn’t receive the increased income from their participation. Second, the Court limited
the sustainability of the LLLT business model by only having one practice area. LLLTs who were hoping to have multiple licenses are now limited to relying on just one to maintain their business. While that may be viable in some areas of the state, it may not be feasible in others.

**LOW INTEREST IN BECOMING LICENSED AS A LLLT**

The second reason cited by the Court for sunsetting the program was low interest in becoming licensed as a LLLT. There were several factors involved in the slow start to the program. First, the practice area curriculum was initially taught at local law schools. Not only was it difficult for the schools to staff the program, but students were unable to obtain financial aid for the program due to federal guidelines. Once it was clear that it was not feasible to continue the curriculum at the law school level, the Board asked the WSBA to create a platform for the courses using WSBA technology resources.

The Bar refused. Since that time, the curriculum has been shifted to local community colleges. The curriculum was designed to be the same no matter where it was taught, which made it easily portable to the community college level, at any location throughout the state. The courses are taught remotely and students are now eligible to apply for financial aid to complete the coursework. In addition, the community colleges are able to recruit students from their already established paralegal programs and can provide an alternate career path.

Another barrier to individuals entering the LLLT program was the 3,000 hours of work experience. Three thousand hours works out to about 1.5 years of full-time employment. However, most candidates are enrolled in education programs while trying to gain work experience. Working part time to gain the work experience significantly increases the amount of time it takes to achieve the 3,000-hour limit, often taking 3 years or more. In the Court’s decision to sunset the program, they agreed to lower the experience requirement to 1,500 hours, which may have been the best choice from the beginning. In addition, experienced paralegals were given a waiver if they had significant work experience, but the waiver was only applicable for a limited time. Many proponents of the program feel that the waiver should have been permanent for experienced paralegals.

As of May 1, 2021, there are 46 licensed LLLTs, 17 took the spring bar exam, over 40 are enrolled in practice area courses, and over 150 are enrolled in the core curriculum classes. For those starting the program from the beginning, it takes approximately 5 years to complete – 2 years for an associate degree, 1 year for the practice area specific curriculum, and 1.5 years of full-time work experience. Since the program was just begun in 2015, those who started working toward their requirements in 2015 would just be completing those now. The numbers of those enrolled in core curriculum classes has grown, as have the numbers in the practice area courses. Program enrollment is starting to reach anticipated levels and expanding practice areas and lowering experiential hours requirements would only draw in more interested candidates.

**CONCLUSION**

The Supreme Court began exploring the idea of a limited license for paralegals as a means to address the access to justice crisis in Washington State in the early 2000’s. It took nearly 15 years for the program to get to where it is now, and to expect it to be self-sustaining at this point is unrealistic. The LLLT Board worked tirelessly for years to develop all aspects of the program to ensure it was academically rigorous, affordable, accessible for all. Having all of that time and effort stripped away in one quick decision without consideration of the facts, is unfathomable.

The Court’s rationale in making the decision to sunset the program was unfounded and unsupported. The argument that the program was too expensive stems from the WSBA internal struggles and incorrect management of the program. Some of those issues have been corrected and improvement could be shown going forward if the program were given a chance. In addition, the argument that there was lack of interest fails to consider the time to complete the requirements and the lack of additional practice areas. The LLLT program has been a model for other jurisdictions across the country to use in crafting their
own licensing programs. Washington led the way in increasing access to justice for low- and moderate-income individuals. In addition, it created an alternate career path for legal professionals. The program is growing in both potential LLLTs and the number of clients served. With that will come the financial benefit of the program to the WSBA and the legal community.

After the decision to sunset the program was made and before the Board’s annual report to the Supreme Court was presented on April 21, 2021, the Court accepted public comments regarding the decision to sunset the program. The Court received hundreds of comments from interested parties advocating the Court reverse their decision. As of this writing, there has been no decision or comment from the Supreme Court.

ABOUT THE AUTHOR

BRENDA COTHARY is a paralegal at Coordinate Care, a managed care organization that provides health care services to members across Washington State. She has worked as a paralegal for 20 years and has experience in bankruptcy, collections, risk management, eminent domain, personal injury, administrative law and contracts. She is also NFPA Region I Director.

REFERENCES


2 Id. at 29.

News Flash: Federal Circuit restarts in-person arguments

The patent-focused U.S. Court of Appeals for the Federal Courts will resume in-person oral arguments for the September 2021 court sitting starting on August 30, 2021. The Federal Circuit’s new protocols for in-person argument as well as a new administrative order implementing the changes are available on the court’s website under the Announcements tab. (http://www.cafc.uscourts.gov/).

“The Protocols reflect the court’s strong preference for in-person argument, based on the court’s experience of its distinctive value and concern for the health and safety of the court, its staff, the bar and public.”

Arguing counsel must electronically file Form 33A certifying in advance of the sitting that they have read, understand, and will comply with Protocols and ensure that all their attendees have read and will comply while in the Nation Courts Building.

• Only arguing counsel and no more than two other attendees whose presence is necessary to assist or supervise arguing counsel (such as a client, lawyer sitting second chair, or paralegal) are permitted access to the National Courts Building and the courtroom.

• Fully vaccinated individuals may forgo wearing masks and physical distancing. Individuals are considered fully vacci-
Virtual Meeting Networking Best Practices & Germ-Free Handshake Alternatives

Compiled by Ronell B. Badua, AACP

Hosting a hybrid event requires connecting physical and a virtual event together. How do we successfully integrate in-person attendees with the virtual attendees at conferences?

**BUILD YOUR PROFILE**

Your profile is an effective way for other attendees to discover who you are, what you do and how to reach you outside the virtual world. When you receive your Conference packet email detailing instructions on downloading the convention app, take a moment to build your professional profile. This is a great way to introduce yourself and boost your visibility. Mention your areas of expertise, social handles and, if available, your website details to help other colleagues of similar interests to contact you.

**VIRTUAL INTERACTIONS**

Create meaningful connections through our virtual interactive platform. Engage in breakout sessions, networking opportunities, vendor demonstrations and group chat rooms. Browse event brochure and personalize your schedule/agenda, and network before or after convention while using our convention platform, Whova. That’s right, the convention app allows you to interact after the convention – take advantage of this feature.

**POLLS AND Q&A SESSION**

Let’s be honest – your engagement is one of the biggest challenges during a virtual event. During live sessions, you should be able to share feedback and ask questions. Believe it or not, this improves interaction and exchange of information among speakers and attendees. Your feedback encourages discussion that results in building a long-term relationship and gather views from participants.

**RAISE HAND FEATURE**

This function is generally offered by virtual platforms. Leverage this feature to engage with the speaker and other attendees and share the stage with the host/speaker and be visible to others attendees.

**CHAT**

All registered attendees will have access to NFPA’s Whova virtual platform and mobile app to network with each other along with exhibitors. Attendees can enhance their convention experience through the chat and breakout room features. Use this form of discussion during forums to create meaningful conversations related to the session in progress.

**EXPANDED REACH - EMAIL FOLLOW UP**

During the convention, it is important to focus on networking and to connect with vendor partners. Send a quick email to all your connections that you made with your bio and contact information.

The pandemic has changed many simple aspects in our lives. If you like to give hugs or a handshake, you are probably wondering how do I connect with those around you safely. How do in-person attendees greet others safely while maintaining distance?

**FRIENDLY WAVE**

A simple way to acknowledge someone is a friendly wave. Add a hello to that and genuinely show you are excited to reunite with a colleague or make a new friend.

**FOOTSHAKING**

While handshaking might be a thing of the past, you can “shake” feet. While standing on one leg, tap your foot against another person’s foot. Just be careful not to lose balance and acknowledge what you are doing with a colleague as a matter of respect.
NAMASTE
Greetings to you! Namaste is a traditional salutation used throughout Southeast Asia to signify respect and gratitude. Practice this gesture, press your palms together in front of your heart and bow your head slightly.

HAND OVER HEART
Indicate genuine happiness when meeting someone, try the no-touch greeting of placing your right hand over your heart.

[JIM & PAM] AIR-FIVE
Give someone an enthusiastic high-five, but stop short before your hands touch to keep your distance.

SEND A SHAKA
The shaka is a laid-back way to say hello that originated from the Hawaiian Islands. To send a shaka: make a fist with either hand. Extend the thumb and pinky while keeping the middle fingers curled under. Face your thumb and pinky away from your body and draw an invisible “j” in the air. Give your shaka a shake and you’re communicating.

VULCAN SALUTE
Perhaps a more casual greeting to flash was created by Leonard Nimoy of the sci-fi titan Star Trek, the Vulcan Salute is an alternative to a handshake, high five or wave. Make like Mr. Spock and raise your hand, palm facing out, with the thumb extended and fingers separated between the middle and ring fingers. If you happen to find yourself among lovers of sci-fi pop culture, salute away [...live long and prosper].

TIP YOUR HAT.
Wearing a hat? Another alternative gesture to say hello or express gratitude and greet someone by tipping your hat/cap. How classy! While we might never go back to shaking hands after the pandemic, professional interactions still exist and we hope these alternatives will help you navigate our new social landscape and prevent the spread of germs.

ABOUT THE AUTHOR
RONELL B. BADUA is a paralegal for the City and County of Honolulu, Department of the Corporation Counsel, where he works on Hawaii’s largest public works project as the transit paralegal. Mr. Badua received his paralegal certificate from Kapiolani Community College’s Paralegal Program, an American Bar Association-approved paralegal education program. Prior to being elected as Director of Marketing, Mr. Badua served two consecutive years as NFPA Region I Director.
WHERE DO WE GO FROM HERE?

March 2020 was the month my husband and I went to Ireland to celebrate my 40th birthday. It was a trip that was months in the making and, when we left the United States, COVID-19 was largely relegated to China. There was no reason to think things would change.

Four days later, an ocean away from our children, we began to receive well-meaning updates from our friends and family: the U.S. borders would soon be closed to all non-U.S. residents due to rising COVID-19 cases worldwide. My husband and I tried our best to enjoy ourselves, but three days later the Irish government shut the country down. The streets were empty; all bars and restaurants were ordered to close. We had to get out — and fast! I was in communication with my firm and participating in COVID-19 task-force calls from Ireland. My husband and I made it back to the States, and the following week, my firm sent us all home to work remotely — where we all remain today.

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While your COVID-19 story may not be as Orwellian as mine, there is no doubt that the pandemic has knocked you, and your firm, for a loop. Although the “new normal” has proven to have some positives among the drawbacks, one thing is clear: Things will never be the same.

Pre-COVID-19, it was an absurd notion for many that nonexempt employees would ever have access to technology to enable them to work from home. “How can they be trusted/monitored/productive?” But suddenly we were forced to push forward and implement such technology options. Many of us were not prepared for the speed at which we were required to outfit the population of our firm to work from home successfully.

I decided to take on a research project to find out just what effect COVID-19 was having on our firms. After polling 363 Association for Legal Administrators members, I found that 9.05% of the respondents spent $15,000 or more in getting their firm personnel ready to work from home, with 2.34% of the respondents spending more than $65,000. Most firms, over 60% of respondents, did not have a work-from-home policy prepandemic. Of those that did (39%), less than 20% included allowances for nonexempt employees. Eight months later, though, we have proven it can be done. We have seen that all levels of employees can work remotely successfully if their functions allow them to. So does this mean remote working is here to stay?

“Nothing depends on the industry, because you can see people are working remotely and will likely continue to do so,” says Ashlee Grant, a board-certified Labor and Employment Partner with BakerHostetler. “Folks are looking to adopt a policy that can be broader and more long-term. We all need to look at being more flexible.”

DOES THIS MEAN ELIGIBLE JOB DESCRIPTIONS SHOULD BE UPDATED TO INCLUDE VERBIAGE ABOUT WORK-FROM-HOME FLEXIBILITY?

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Does this mean eligible job descriptions should be updated to include verbiage about work-from-home flexibility? “Absolutely!” she says. “Employers are going to see an influx of requests to work from home, even after COVID. The hard work has already been done — take the data, analyze it and adjust as needed.”

WORKLIFE AFTER COVID-19

Of course, there are other options. The Society for Human Resource Management (SHRM) created short-term telecommuting agreements and temporary telecommuting policies that can be used during the pandemic, should your firm opt to continue work-from-home allowances for the near future.

Based on my survey, I believe a hybrid option is the best choice and will be the choice of many firms in the future. Of the respondents, 30% indicated they would be open to allowing attorneys to work from home at least a few days a week post-COVID-19; 26% said they were open to the same for exempt staff; and 16.21% indicated they were open to the same for nonexempt staff. An overwhelming number, 87.91%, indicated they were not considering a 100% virtual environment.

There are ways to ensure productivity and security with a remote workforce, too. “With technology, [the Fair Labor Standards Act] is adapting. There have been cases of email issues, time off the clock, etc.,” says Grant. “Employers are going to have to rely on technology to track these issues — if they’re using our network and our equipment, I see no issues with
tracking/monitoring. Of course, how expensive is it? That is the first things folks will ask, but I do think it is necessary if we continue to work from home long-term.”

Monitoring tools that track productivity and mediate potential security threats do exist. However, these tools are not without risks. According to a recent SHRM article, monitoring is subject to a variety of federal and state laws. Additionally, you should communicate to employees that they will be monitored.

But the biggest concern may be a loss of trust: 73% of employees felt introducing technologies to monitor their work product would damage trust between the employee and their employers, according to a survey cited by SHRM.

Data protection is another concern associated with remote work. Ensuring secure remote access is essential to meeting data privacy regulations. Each firm needs to review and revise their technology policies to ensure they are compliant with the Health Insurance Portability and Accountability Act (HIPAA), the General Data Protection Regulation (GDPR), local laws, as well as ethical and professional responsibility requirements. Once finalized, the firm must ensure that each employee with remote access has reviewed and understands the policy and will operate within those parameters.

**OFFICE SPACE**

Continued remote working has the potential to be a win-win for the firm and its employees. Travel costs have decreased, and this period has certainly proven that some meetings really could have been an email. The firm’s most considerable money-saver, though, is real estate. With the success of work-from-home, some may consider reducing their office size.

However, given concerns over social distancing and high-touch surface areas, the changes needed may not be as obvious as one would think.

“Some markets talked about putting attorneys in a shared space, and that can work in theory — reduce footprint — but that doesn’t allow for recommended social distancing,” says Kenneth Wiesehuegel, a Practice Area Leader for design firm Gensler’s South Central Region.

A recent Gensler survey showed that only 10% of U.S. employees want to work from home full-time, but those who want to return to work expect crucial changes to the workplace. So will space design change completely?

“We have seen a lot of trends focused on health and wellness. This is pushing it further — good air quality and outdoor space,” says Wiesehuegel. “The desire for more outdoor space is accelerating, and new buildings are providing that. With existing buildings, we think we will continue to see biophilic design elements like a moss wall, green wall, indoor planters. A space that creates a sense of the outdoors and a sense of well-being with the added benefit of oxygenating the air.”

Additionally, it’s important that all people, both in-office and remote workers, have the opportunity to meet and that the space provided lends itself to doing that safely.

My previous firms traditionally had two office sizes: partner and associate. In recent years, the new firm buildouts making headlines featured single-sized offices and lots of open and collaborative spaces. In my experience, most attorneys were using their offices half the time due to travel.

“If you need to be in the office, you ‘book’ an office, like a conference room. Hoteling offices are appropriate if there are proper cleaning protocols overnight,” Wiesehuegel says. Freshfields announced in August they are implementing an “office release system,” which means someone else can use your office if you are working remotely. This will allow the firm’s new space to be 20% smaller than their existing space.

While these small changes will have long-lasting impacts on the market and the way firms operate in the future, I do not believe firms are moving to 100% virtual options any time soon. Husch Blackwell launched a 100% virtual office in the midst of the pandemic; however, the data from my survey suggests most firms will not follow suit.

“We expect to see work-from-home and flexible work arrangements being implemented on a broader scale and becoming a permanent part of company policies,” says Anya Marmuscak, Vice President and Commercial Real Estate Adviser at JLL. “This doesn’t necessarily equate to less office space and office demand, but the purpose and the use of the office will evolve. Surveys are showing that people want to work from home one to two days per week, not every day, due to distractions, home environment and need for face-to-face interactions, etc.” This is on par with what the data from my survey suggests.

“Initially most projects and lease decisions were put on hold, and unless a lease was expiring in the near term, I was advising them to wait,” says Marmuscak. “Many tenants are delaying decisions in the short-term and looking at opportunities to restructure leases. We are taking a much harder look at employee utilization of space; companies that aren’t studying this need to.”

So what does that mean for the downtown, Class A office space we associate with law firms? “The future of the office will be designed around the talent the organizations are trying to attract,” says Marmuscak. Now that they know they can work from home effectively, a certain number of quality candidates will be uninterested in living in or commuting to the urban core.

That may result in some organizations downsizing their headquarters in favor of “satellite” offices in outlying neighborhoods or suburbs, Marmuscak says. Employers could use the lack of a commute (and its accompanying expenses) to offer employees a lower salary — emphasizing their flexibility.

Some may even opt for coworking spaces: “There are no upfront capital costs, and
they offer shorter terms with total flexibility. You can scale those offices based on where talent lives and based on business and individual employee needs.”

**WORK-FROM-HOME PITFALLS**

Working from home is not without its issues. Take for instance my 6-year-old, who believes she’s a star every time she crashes a Zoom meeting. People inevitably multitask; the lines of work and family get blurred, and feeling torn between them causes guilt. Setting clear guidelines and expectations of availability — while realizing that flexibility is key — is a must in a work-from-home environment. With most schools now in session and many parents playing teacher and employee, giving them grace and understanding goes a long way, too.

Then there are equipment issues. Until recently, I was struggling to do everything on my small laptop and an old computer chair. I realized in order to be as productive as I could be in the office, I needed my home office to have the same functionality of my work office. But how should firms handle expense reimbursement and possible accommodations for home offices?

“Some of this will depend on how much they are working from home,” says Grant. “If [the employee works] entirely from home, I could see that being an accommodation. Of course, it could at some point become an undue burden, so there needs to be a balance. So we need to look at what is being asked in the expense. Is it an actual accommodation being requested? Is the employee asking or is the employer requiring work-from-home?”

There is also the loss of face-to-face interaction. A recent JLL survey found that 44% of people working from home miss human interaction, and it’s not being replaced by virtual meetings. People want to be in the office and engaged.

There is also the loss of face-to-face interaction. A recent JLL survey found that 44% of people working from home miss human interaction, and it’s not being replaced by virtual meetings. People want to be in the office and engaged.

According to a New York Times article, distance bias describes a dynamic that can occur in a remote work environment. Because people put more emphasis on those closer to them and don’t try to make connections where there isn’t proximity, they only maintain relationships with the people they already know. When a leader is looking for someone to work on a project, most go to the comfort zone of people who remind them of themselves. Managers must be aware of and trained on these issues so that they can ensure work is distributed equally.
HOW LEGAL MANAGERS CAN HELP LEAD

I believe there are a few keys to meaningful engagement and high morale during this period:

- Connection and communication
- Recognizing hard work and effort
- Showing your humanity
- Encouraging actual breaks or time off

My office sends out a weekly digital word search and hosts a weekly staff meeting, coffee chats and lunches. I created a COVID Chronicles newsletter that includes funny memes; a section for awing over at-home “coworkers” (usually a dog or a child); and employee recommendations for books, TV shows, movies and new hobbies. We encourage body movements by occasionally asking people to increase their step count or do a form of seated or standing exercise. Lastly, a few weeks ago I began “showing my humanity” in Friday emails. I usually discuss things I am struggling with and end with a message of hope in the form of a TED Talk or article. I ask that our folks view or read the material to discuss at our next staff meeting.

The biggest job of any firm leader is to protect the firm culture and engage the people it employs. Do we move people to work or move work to people? I think the answer is clear, open the option of both and let the work, productivity and retention speak for itself.

“The online survey was open to over 6,900 ALA members in 33 countries between July 13 and July 24, 2020. Each respondent worked within a law office or legal department.”

ABOUT THE AUTHOR

MONIQUE MAHLER is the HR Manager for Baker Hostetler’s Houston and Dallas offices. She is the first recipient of the Foundation of the Association of Legal Administrators’ Legal Education Scholarship. Mahler received a bachelor's in sociology from the University of Houston – Downtown. She will obtain her master's degree in legal administration from the University of Denver’s Sturm College of Law in May 2021.

Biometrics and the Law

By Rochelle A. Arnold, CRP™

Biometrics are the measurement and analysis of unique physical or behavioral characteristics such as fingerprints, retina scans, voice patterns, and facial geometry. Biometric information is used as a means of verifying personal identity. The Illinois General Assembly passed the Biometric Information Privacy Act (BIPA) on October 3, 2008. Codified as 740 ILCS/14 and Public Act 095-994, the BIPA guards against the unlawful collection and storing of biometric information.

STATE LAWS

When Illinois passed the law in 2008, it became the first U.S. state to regulate the collection of biometric information. Washington and Texas have since passed similar laws. However, the BIPA remains the only law in the U.S. that allows private individuals to file a lawsuit for damages stemming from a violation. The Act advises $1,000 per violation, and $5,000 per intentional or reckless violation. Because of this damages provision, the BIPA has spawned several class action lawsuits.

The Biometric Information Privacy Act requires companies doing business in Illinois to comply with several requirements pertaining to the collection and storage of biometric information. Among other necessities, businesses must receive written consent from individuals before obtaining their biometric data, and they must disclose their policies for usage and retention. With the onset of Covid-19, there has also been a multitude of software devices implemented to take a person’s temperature that may also include a facial scan. Any organization or business that is in the activated states and uses this kind of temperature scanner that includes scans of a client’s face, should be careful to abide by the BIPA laws.

OUTSIDE STATES

Whether BIPA applies extraterritorially to non-Illinois companies remains somewhat of an open question. At least two BIPA defendants located outside the state raised the issue at the motion to dismiss stage, and although the Northern District of Illinois found that there are “legitimate extraterritoriality concerns,” and that BIPA does not apply extraterritorially “as a matter of law,” the defense has not been sufficient—at least yet—to warrant dismissal of a BIPA claim.

STATE COURT CASES

Rosenbach v. Six Flags Entm’t Corp., 2019 IL 123186

Six Flags was sued for collecting patron’s thumbprints without informed consent. The Illinois Court of Appeals ruled that a mere technical violation of the BIPA
was insufficient to maintain an action, because it did not necessarily mean a party was “aggrieved,” as required by the statute. This was reversed by the Illinois Supreme Court which ruled those users do not need to prove an injury (such as identity fraud or physical harm) in order to sue; the mere violation of the act was sufficient to collect damages.

Additionally, an employee of the North-Shore University Health System has sued the company for allegedly collecting workers’ fingerprints without their consent, in violation of the Illinois Biometric Information Privacy Act. In Cook County Circuit Court, the employee alleged “that the defendant scanned and digitally collected his fingerprints without consent, for use with a biometric employee punch clock.”

**FEDERAL TRADE COMMISSION**

Companies outside of Illinois, Texas, and Washington, are not necessarily off the hook. The Federal Trade Commission (FTC) has also been active in the biometrics space. The FTC enforces privacy violations under Section 5 of the FTC Act of 1914, which prohibits unfair and deceptive commercial practices. To help companies understand what might be considered an unfair or deceptive practice, the FTC regularly issues reports and guidance. It did so for facial recognition technologies in 2012. In its report, the FTC indicated that companies using facial recognition should give notice of the purpose of the technology and tell consumers how to get more information. Companies should, according to the FTC, also get consent before using facial recognition.

**KEEP UPDATED**

According to the Guide to the Illinois Biometric Information Privacy Act by John M. Fitzgerald and Alexandra M. Franco: “The definitions of three of those terms – biometric identifier, biometric information and private entity – also contain express exceptions. Of particular interest, biometric identifiers “do not include writing samples, written signatures, photographs, human biological samples used for valid scientific testing or screening, demographic data, tattoo descriptions, or physical descriptions such as height, weight, hair color, or eye color.”

Biometric facial and fingerprint scans are biologically unique to an individual, and unlike a credit card that can be replaced, biometric markers cannot be replaced and put the individual at greater risk for identity theft, with no recourse. With the advancement of technology, biometric law is going to be one of the fastest growing areas of civil litigation in Illinois and across the country.

**ABOUT THE AUTHOR**

**ROCHELLE ARNOLD, CRP™** has been a CORE Registered Paralegal with the NFPA since 2017. She has experience working as a litigation assistant, specializing in medical malpractice and wrongful death cases. She has also worked on the personal injury insurance defense side of the law.
INTRODUCTION

At the March 20, 2021 National Federation of Paralegal Associations, Inc. ("NFPA") Non-Annual Policy meeting, NFPA's delegates adopted the agenda topic: "Adoption of American Bar Association Pledge For Change: Disability Diversity In The Legal Profession," which was submitted by NFPA's Diversity, Inclusion, and Equity Committee ("Committee"). The agenda topic supports NFPA's allegiance to its core values of supporting unity within the profession and embracing diversity. The Committee recommended NFPA adopt and become a signatory to the Pledge. The agenda topic was adopted and passed, and NFPA, through its President Lori Boris, RP®, MnCP, who first hand knows the importance of disability diversity in the legal profession, signed the Pledge. Unfortunately, the agenda topic was not unanimously passed by NFPA's delegates.

According to the ABA: "In furthering its commitment to diversity in the legal profession, the ABA Commission on Disability Rights is promoting “Disability Diversity in the Legal Profession: A Pledge for Change,” a one-page pledge for law firms, law schools, bar associations, judges, courts, and disability organizations to sign. The Pledge affirms the signatory's commitment to diversity, specifically disability diversity, and recognizes that diversity is in the best interest of the profession, those the profession serves, as well as the organization making the commitment. The Pledge also announces that the signatory will encourage others in the legal industry to make this commitment."

FROM WORDS TO ACTION - HOW TO APPROACH ACCESSIBILITY

Although the agenda topic and other discussions are helpful in raising issues about discrimination against people with disabilities in the legal profession, what is crucial is providing information and tips so NFPA and its local associations can take action and make its associations and their events more accessible and welcoming to people with disabilities.

Actions speak louder than words – and are the only way to make sure everyone feels welcomed and heard. Ensuring accessibility to everyone, especially access to people with disabilities, is crucial. We are hoping this article will assist you and your local association understand how to approach accessibility, compliance with the ADA and other laws, and how to ensure everyone is included.

COMPLIANCE WITH THE ADA AND OTHER LAWS

The Americans with Disabilities Act ("ADA") was enacted in 1990 to ensure the civil rights of all people with disabilities whether physical or mental. The ADA is modeled after the Civil Rights Act of 1964. Protection under the ADA for all individuals with a disability requires strict compliance with the ADA and corresponding local laws.

ADA accessibility standards apply to places of public accommodation, commercial facilities, and state and local government facilities in new construction, alterations, and additions. The ADA Standards are based on minimum guidelines set by the U.S. Access Board ("Access Board").

The standards for accessibility are set forth by the Department of Justice and the Department of Transportation. While the Department of Justice sets the ADA Standards for all facilities except public transportation, the Department of Transportation sets ADA Standards for facilities used by state and local governments providing designated public transportation services and include location of accessible routes, detectable warnings on curb ramps, train platforms and bus boarding.

State and local government facilities must follow the requirements of the 2010 Standards, including both the Title II regulations at 28 CFR 35.151 (New Construction and Alterations); and the 2004 ADAAG (ADA Accessibility Guidelines) at 36 CFR part 1191, appendices B and D. The full text can be found at: https://www.ada.gov/regs2010/2010ADASTandards/2010ADASTandards.htm#c1.

Complaints of discrimination under the ADA may be filed with the United States Department of Justice in multiple formats such as online, via facsimile, or by mail.
However, the Department of Justice does not prosecute every violation and will send a letter advising whether or not it will be investigating or mediating the complaint. As such, private lawsuits on ADA violations are permitted at any time.

In an effort to adjust the civil monetary penalties for violation of Title III of the ADA – Public Accommodations and Commercial Facilities, a provision was adopted permitting the maximum penalties to be adjusted for inflation. Currently, for violations occurring on or after April 28, 2014, the civil penalties are set at a maximum $75,000 for the first violation and $150,000 for a subsequent violation.

ENSURING YOUR WEBSITE IS ACCESSIBLE

Your association’s website is the primary way paralegals and the public can learn more about your association, your events, and connect with you. Having a website that is accessible to everyone ensures you are including all the audiences you would like to reach. People with disabilities is the largest diversity group in the world, and is an audience your association should be reaching.

World Wide Web Consortium’s Web Content Accessibility Guidelines 2.0 (“WCAG 2.0”) and Website Content Accessibility Guidelines (“WCAG 2.1”) are universally accepted and adopted sets of guidelines for ensuring web accessibility. While adhering to these guidelines is not currently legally required, associations wanting to anticipate future legal compliance or make their web content more accessible can review and use WCAG 2.1 to design their website.

The WCAG guidelines feature three levels of conformance: A, AA, and AAA. Title III of the Americans with Disabilities Act (ADA) requires your website to achieve WCAG 2.0 Level AA (mid-range) compliance. Following the guidelines will make websites more accessible to persons with disabilities who use assistive technologies such as speech-to-text software, scanning and switches, etc.

When you are updating your website or replacing it entirely, ensure those who are in charge of this process are familiar with and adhering to the WCAG guidelines.

PLANNING ACCESSIBLE MEETINGS AND EVENTS

Keeping in mind not only the regulations of the ADA’s accessibility requirements, but also the opportunity for all individuals to benefit from and bring benefit to meetings and events, making meetings and events accessible should be in the forefront of the organizer’s to-do list!

While the list can be exhaustive and overwhelming in consideration of every accessibility concern, there are some general suggestions that can be implemented in planning events that will benefit all participants, such as:

- When planning an event, care should be taken to remind all participants of the possibility of environmental allergies and sensitivities and request that all participants refrain from wearing strong fragrances.
- The registration for events and meetings should including interactive information from the enrolling participants. Suggestions could be:
  - An invitation for all participants to contact the event organizer or committee, to request accommodation or advise the event organizer of accessibility issues.
It is understandable that some events may not be able to accommodate every specific request, but knowing in advance what arrangements are requested will allow the organizer an opportunity to determine with the participant if alternative arrangements can be made. Asking attendees what accommodations, if any, they need, is a great place to start. Individuals with disabilities may be hesitant to request accommodation – and most shouldn’t have to do so. Review the venue in advance and keep in mind some of the following suggestions:

- Visibility
- Acoustics
- Mobility
- Technology
- Service Animals

During the course of the event, if the size of the event warrants, assign several individuals to assist those with disabilities by providing direction and making sure the accommodations are in place.

- Presenters should be provided with a pre-event checklist requesting some or all of the following:
  - Provide materials in advance to be distributed to participants unable to view screens or turn pages;
  - Be prepared to verbally describe visual materials;
  - If providing printed material, offer large print options;
  - Avoid using small print during presentations for those visually impaired or just generally for those sitting in the back of the room;
  - Ensure use of adequate microphones;
  - Activate captions on videos;
  - Encourage routine breaks; and
  - Be cognizant of repeating questions during the Q&A section to ensure all participants can hear the questions presented.

Local associations will find it to be extremely helpful in reviewing site selections to check for barriers and other ADA-non-compliance prior to reserving the facility. The venue chosen for events and meetings should keep in mind the accessible approach and entrance, access to goods and services, access to restrooms and access to other public facilities, such as water fountains, public telephones, etc.

With a little consideration and pre-planning, events and meetings can be made beneficial to our wonderful diverse population bringing benefit to all.

ABOUT THE AUTHORS

BRENNADICKEY, a PACE® Registered Paralegal, is a member of NFPA's Diversity, Inclusion, and Equity Committee. Brenna is also a member of the Oregon Paralegal Association, holding various roles in OPA’s leadership, including her current role as NFPA Primary Representative. For the past 22 years, Brenna has worked in Pacific Northwest regional law firm, Miller Nash LLP’s business department, assisting the firm’s clients and attorneys with mergers and acquisitions, corporate formation and maintenance, and due diligence review. Brenna is proud to be part of MN, which has successfully completed Diversity Lab’s Mansfield 3.0 program and has achieved Mansfield Certification Plus status. To learn more about Brenna, check out her bio: http://www.millernash.com/brenna-dickey/

SALIMAH ROSENBERRY, Pa. C.P., is a Certified Paralegal with more than 35 years’ experience. She currently works for a firm in Dauphin County, PA and resides in Franklin County, PA. Salimah serves on NFPA’s Diversity, Inclusion, and Equity Committee as well its Ethics Board. When she is not working, Salimah volunteers as a WellSpan Patient Partner and PFAC committee bringing a community member’s voice to the hospital staff and volunteers with the local Diversity, Inclusion & Equity committee when needed. Salimah enjoys spending time gardening, bike riding, kayaking with her high school sweetheart, now husband, and taking her beloved lab, Crush, on long walks.

EDUCATION ON DEMAND!

NFPA has an extensive library of recorded webinars. If you missed these sessions they are available on demand on the NFPA website - Events/ Recorded CLE Webinars


Income Taxes in Decadent Estates (5/11/21) - Presented by Donald P. Bristol, RP®, Pa.C.P

A Day in the Life of a Commercial Real Estate Paralegal (11/4/2020) - Presented by Mariana Fradman

All recorded webinars are $25 for NFPA members and $50 for nonmembers.
DIVERSITY, INCLUSION AND EQUITY

The Golden Rule
By Mpho Chapi

As an African-American girl with a South African name, I was routinely judged and sometimes bullied about my name at school. As early as kindergarten, students considered my name to be a sound affect as it did not sound and read like the common names of most students in New York City. I was asked questions such as, “What type of name is that?” which put me in a constant position of explaining its origin. I was merely a small child, trying not to stand out like a sore thumb and merge well within American society, so this occurrence frustrated me.

After being criticized about the distinctiveness of my name, I wondered whether my name would cause others to come to conclusions about the type of person I was before holding a solid conversation with me.

I later began to realize that standing out was something to celebrate and embrace. My full name: Tekadimpho, translates to Teka (take) – Di (the) – Mpho (gift). My relatives on my mother's side of the family, who named me, would say that it means “take the gift from God.”

As I grew older, matured, and made accomplishments in my life, I began to be surrounded by individuals who found my name interesting as opposed to weird or strange. I started to understand that with a hard work ethic, and honest pursuit of my goals, and seeing those goals to completion, my name enhanced the curiosity of others to find out who I am.

When I began college, I soon met a few people from other parts of Africa with names like mine who were highly active in their college community. Their names and cultures were embraced by those who surrounded them.

I was raised in a household where much of my upbringings was by my mother’s side of the family. My father, an African-American, was born and raised in the Bronx as were his parents. My mother was born in South Africa and was raised and attended school during the apartheid era which existed in South Africa from 1948 to 1994.

The term “apartheid” is an Afrikaans word which means “apartness,” and it was used to divide South Africa’s black population from its white population. This division, which was implemented by the Afrikaners, was intended to prevent social integration between racial groups.

The apartheid laws were based on many acts that economically compromised South Africans. The Bantu Self-Government Act of 1959, which mandated that racial groups live in separate areas, moved all black people out of the city and placed them in townships outside of town where they lacked essential resources.

The rise of apartheid disadvantaged and caused harm to a majority of the black population. This Act caused South Africans to lose their homes and be relocated far from their workplace. Apartheid utilized various mechanisms to control black South Africans.

One of these mechanisms was to require all South Africans to have a Pass Book also known as a “Dompas.” Pass laws controlled the movements of Black South Africans from rural areas to developed urban areas. South Africans who were granted a pass were approved only if they met a number of criteria. For example, individuals with birth defects were denied a “Dompas,” which was required to be produced on demand wherever they were.

The person that I am today was largely shaped by the experiences of my mother’s side of my family. I learned a combination of various languages that were spoken in South Africa. Zulu, which is spoken often, is the language that I most easily grasped. My parents would occasionally teach me a few words in Afrikaans, which was derived from the Dutch language that was mandated to be taught and spoken in public schools during the years of apartheid. My mother would often say when we would have to go somewhere, “latt ons gaan,” which means, “let us go” in Afrikaans.

Learning this history exposed me to the educational barriers faced by the mother’s side of my family during the 1960s - 1990s and made me appreciate even more the freedoms and liberties that we possess today.
Equity is a term that holds many different interpretations as people define fairness in various ways. An individual's interpretation of fairness is formed by their principles and values. Our society is formed by a variety of immigrants whose cultures and unique qualities give this country its originality. If everyone were the same, it would be difficult for society to advance and create innovative ideas for the development of society. To eliminate this type of bias, institutional leaders can develop strategies to foster inclusion and implement policies to prohibit differential treatment. These policies and strategies will be a basis for individuals to practice the golden rule which says: “treat others as you would like others to treat you”. This will serve as encouragement for academic and social success and will allow students and future professionals a chance to share their gifts with society.

From my experience with bias, I have learned that a person’s name can never be what other people make of it, only what the person to whom the name belongs decides to make of themselves.

People had their own interpretation of how my name symbolizes me but when I began to achieve accomplishments, my name opened the door of the perspective of others because it added a unique element to my identity.

ABOUT THE AUTHOR

MPHO CHAPI is a Volunteer Legal Assistant at Legal Hand Organization with two years of experience assisting with legal issues in the Bronx, New York. She graduated from John Jay College of Criminal Justice with a Bachelor’s degree in Law & Society and received a certificate from Hofstra University’s Continuing Education Paralegal Studies Program. She is a member of the New York City Paralegal Association and is also a member of NFPA’s Diversity, Inclusion, and Equity Committee. In addition, she volunteers with New York Cares Organization and Food Bank, providing tax preparation services.

This article was first published in the Summer 2021 issue of The National Paralegal Reporter and the author’s attribution was incorrect. We apologize to Ms. Chapi for this error and are pleased to reprint the corrected article.
Joy Henderson, RP®
Sacramento Valley Paralegal Association
Area of Specialty: Litigation

WHAT IS A TYPICAL WORKDAY LIKE FOR YOU?
Run, run, run. You never know what each day will hold. There are always emergencies, and you have to be flexible. I am on the phone with clients a lot and you need to be on the ball and know what is going on in their case so they will have confidence in you and the firm.

I BECAME A PARALEGAL BECAUSE . . .
I was fascinated with the O.J. Simpson trial. I used to be a certified nurse’s assistant and would watch the trial everyday with the patients. I actually started going to school at night to be a paralegal while I still worked at the nursing home during the day.

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?
Take a deep breath. Make a list of deadlines and keep it in front of you as you are doing your tasks.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?
Paralegals are very important. They find all the hidden information in the case and relay it to the attorneys. The attorneys don’t always have the time or bandwidth to find the hidden gems.

FINISH THIS SENTENCE:
IF I COULD NAME THE AUTOBIOGRAPHY OF MY LIFE, IT WOULD READ . . .
Joy ran through life and did not let anything stop her.

IF I WEREN’T A PARALEGAL, I WOULD BE . . .
work at the SPCA and rescue dogs.

A PARALEGAL IS . . .
a very important part of every legal team.

HOW HAS THE PANDEMIC CHANGED YOU PROFESSIONALLY?
I am a lot more flexible. I realize that everything cannot always be the way it was before the pandemic.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?
My most memorable moment was when I passed the PACE Registered Paralegal exam.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?
The most important benefit is the PACE Registered Paralegal designation because it helps me to stand out against other paralegals when I have applied for jobs. It shows that you go the extra mile to be registered because it is not required in California yet.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?
I enjoy being on the Board of Directors and talking to the same paralegals that I work on cases against in a friendly matter at the luncheons.

HOW HAS BEING AN NFPA MEMBER BENEFITED YOU PROFESSIONALLY?
I have learned a lot from the time I was a student in 2003 to the present. The laws and the way the courts run things in California are always changing so all the continuing education that NFPA does has benefitted me tremendously.

HOW DO YOU SPEND YOUR FREE TIME?
I enjoy being on the Board of Directors and talking to the same paralegals that I work on cases against in a friendly matter at the luncheons.

WHERE DO YOU FIND YOUR INSPIRATION?
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Roxanne Martinez
Baton Rouge Paralegal Association, Inc.

Area of Specialty: Litigation Paralegal in Insurance Defense/Paralegal Trainer

**How Has Being an NFPA Member Benefited You Professionally?**

This is my first year to be enrolled.

**What Do You Enjoy the Most About Being a Member of Your Local Association?**

Community Involvement and networking

**What Is a Typical Work Day Like for You?**

Checking emails, issuing subpoenas, following up on due requests, analysis of various types of records and draft summaries of same, some training, setting AMOs, and preparing for depositions and mediations.

**I Became a Paralegal Because . . .**

I watched the OJ trial from start to finish. After, I decided to return to college to obtain Associate Degree in Paralegal Studies.

**What Is the Most Important Trend Affecting the Legal Field?**

Working remotely from home.

**What Advice Would You Give a Stressed Out Paralegal?**

If you are assigned to multiple attorneys, do a few tasks for each every day when possible. Alternatively, you can work one attorney’s task on Monday and another on Tuesday, etc.

**What Has Been Your Most Memorable Moment of Your Career So Far?**

Recently, I started training paralegals who join my firm with limited experience. Training is something that I have wanted to incorporate into my career for many years.

**What Impact Do Paralegals Have in the Delivery of Legal Services?**

Paralegals can be attorney’s right-hand-woman to identify information and obtain documents that support allegations or defenses.

**Finish This Sentence**

**If I weren’t a paralegal, I would be . . .**

If I weren’t a paralegal, I would be an investigator.

**A Paralegal Is . . .**

A paralegal is an individual who can multitask with efficiency.
Annie M. Gagne, CRP™

Paralegal Association of New Hampshire (PANH)

Area of Specialty: Criminal Prosecution

HOW HAS BEING AN NFPA MEMBER BENEFITED YOU PROFESSIONALLY?

Being an NFPA member has connected me with so many resources I didn’t know existed. Whether it has been through CLE’s, networking with other members, or learning about the CEDS accreditation (thank you Lisa Lynch), I’ve gained access to more information than I could have imagined.

WHAT DO YOU ENJOY THE MOST ABOUT BEING A MEMBER OF YOUR LOCAL ASSOCIATION?

As President of PANH, I love being both a voice for our paralegal community and an ear for our members concerns and needs. Helping others is one of my passions, and so as a member of an organization that is constantly working to increase educational opportunities and career awareness for our paralegals, I enjoy being in the forefront making those positive changes.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

Educational opportunities! Knowledge is power in my mind, so having access to educational sessions, trainings, conferences and certifications is the most important to me. Like most in our field, I’m an overachiever and strive to be the best version of myself. With that comes the desire to be as knowledgeable about my field as possible, so maintaining my credentials and attending conferences will always be at the top of my to-do list.

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?

While I don’t know every practice area, I like to think criminal prosecution is like nothing else. When people ask what my job is like, I jokingly tell people it’s like an episode of ‘Law & Order’ except cases aren’t solved in 45 minutes, especially the really bad ones. That reference isn’t far off though, I do work with law enforcement almost every day, and it does feel like I’m either in a hearing or prepping for a hearing every week. I work at the NH Attorney General’s Office and, as the Covid restrictions have lifted, our trial schedules are gearing back up. As I am the Trial/Tech Paralegal for the Criminal Bureau, I’ll be spending the next year or so in and out of trials, so the short answer to this question is, extremely busy. I will note, I have learned to run in my heels!

I BECAME A PARALEGAL BECAUSE . . .

I want to help others who can’t help themselves. That speaks more directly to my chosen practice area than anywhere else (I work a lot of homicide cases), but I want to do what I can to make life a little easier for people. Whether that be my attorney’s on a call out or preparing for trial, or the victim’s family members, I want to ease whatever difficulties I can, whenever I can.

WHAT IS THE BEST WORK FROM HOME TIP TO SHARE WITH A COLLEAGUE?

Stick to a schedule! For the few months I chose to work from home, keeping to a schedule helped keep me sane. I made sure to also schedule in breaks and taking a walk on my lunch helped change up my scenery and power me through my afternoons.

HOW HAS THE PANDEMIC CHANGED YOU PROFESSIONALLY?

I now communicate more efficiently than I did before. When the office first made changes due to the pandemic, all meetings were moved to Zoom and Webex, however we quickly learned that not every conversation required that virtual face-time. Brief phone calls, texts and Teams chat became the best way to discuss cases and topics.
WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

Convicting a defendant of second-degree murder for recklessly causing the death of his girlfriend’s infant son. I ran the trial presentation in that case and after a very exhausting few weeks (not counting all the prep work leading up to trial), he was found guilty of murder and sentenced to 45 years to life in prison. It made all the long days and sleepless nights completely worth it.

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?

Take a deep breath and pick a single place to start. Accomplish whatever that task is, then pick the next one. After a while, you’ll have worked your way through whatever is stressing you out and moved on to your next challenge.

WHAT IS THE MOST IMPORTANT TREND AFFECTING THE LEGAL FIELD?

Technology, without question. Whether it is needing to learn how to handle technology when it comes to discovery and electronically storing data, or it is new programs to build and present cases in court, technology is now at the forefront of our field. Knowing and understanding how to best support our attorneys and our firms through the use of technology has never been more prevalent, and the need will only grow as technology continues to develop.

WHAT IMPACT DO PARALEGALS HAVE IN THE DELIVERY OF LEGAL SERVICES?

We have the ability to streamline legal services so much! There are so many duties in the course of a business day that can be completed by a paralegal that can save attorneys time and energy. Sometimes attorneys don’t realize the skill set we have goes beyond witness folders and billing and case management, we can draft their pleadings, interface with client and vendors, and so much more. Don’t be afraid to offer your skills up to your attorneys, let them know what you can do!

FINISH THE SENTENCE

IF I COULD NAME THE AUTOBIOGRAPHY OF MY LIFE, IT WOULD READ . . .

Freckled, Fierce and Fun!

IF I WEREN’T A PARALEGAL, I WOULD BE . . .

An architect. Buildings and structures have always fascinated me and I would love to create them.

A PARALEGAL IS . . .

Invaluable and a necessity for any firm.

Vendor Directory

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DIRECTORY CONTINUED ON PAGE 47...

Wolters Kluwer

Legisway Essentials, cloud-based legal management software, provides a secure location to store, track, report on, and share critical legal documents and data. Full of smart functions, Legisway accelerates legal data search and reporting to help legal departments operate more efficiently and reduce risk.

For more information on our exclusive offer for NFPA members, please contact us at 1-877-578-4100 or visit WoltersKluwerLR.com/LegiswayNFPA
NFPA’s 2021 Joint Conference was held virtually on June 11-13, 2021. This virtual event afforded NFPA members the opportunity to access valuable information regarding association leadership, certification, and regulation within the paralegal profession from the comfort of their own home or office. NFPA will offer an on-demand bundle of all the CLE session recordings for purchase. This package will include 7.0 hours total: 4.0 General CLE, 2.0 DI&E, and 1.0 Ethics. Watch for the availability of this package in the NFPA store.

CERTIFICATION

The Certification portion of the Joint Conference was truly a collaborative experience this year. We had many past and present NFPA coordinators participate in panel discussions which provided opportunities for engagement by the attendees. The first discussion focused on the Certification Ambassadors roles, and provided helpful tips, tricks and resources to guide them. The recently launched Certification Ambassador Toolkit contents was also reviewed and was led by a panel including Becky Kerstetter, OSBA (NFPA Strategic Planning Coordinator), Janet Wilson Williams, RP® (NFPA Advisory Board Member), and Angela Woodlee, RP® (member of the Indiana Paralegal Association).

Lisa Vessels, RP®, CP® (NFPA Director of Certification) then discussed the Fast Track program and what had changed since it closed at the end of March, and what is planned for the immediate future. Assurance of Learning partners and affiliates were excited to learn about a planned benefit for their student applicants!

Sybil Taylor Aytech, M.Ed., RP® (NFPA Diversity, Inclusion, and Equity Committee Chair, NFPA Bar Association Coordinator, and NFPA Ethics Board Member) provided an insightful and thought-provoking discussion on Identifying and Mitigating Bias in Certification Study Groups and Candidate Recruitment. This portion also provided attendees with one hour of Diversity, Inclusion and Equity CLE credit (which is interchangeable for the Ethics CLE credit required in PACE® and PCCE credential renewals.)

The last presentation of the day was co-led by Tracey Woolsey, RP® (NFPA Region III Director) and Vanessa Laro, RP®, CRP™ (NFPA Regulation Coordinator) looked at common issues with certification credential renewals and how to address them.

REGULATION

The Regulation portion of the Joint Conference was led by Vanessa Laro, RP®, CRP™ (NFPA Regulation Coordinator) and featured several in-demand speakers on the regulation landscape, as well as two bonus CLE webinars from Pamela Starr, CBA, J.S.M. (NFPA Ethics Board Chair) and Jay Williams, TBLS-BCP and Wayne Akin (NFPA Diversity, Inclusion, and Equity Committee Members).

Starting the day was Ian Bourgoine (Chair of North Shore Community College’s Paralegal Studies Program) speaking on The Impact of Alternative Legal Service Models on Paralegal Compensation and Professional Autonomy. Bourgoine discussed paralegal experiences, job satisfaction, and the calls for greater compensation and autonomy.

Chris Albin-Lackey (Legal and Policy Director of the National Center for Access to Justice) made a presentation on Towards a More Inclusive Conversation on Regulatory Reform. Albin-Lackey included a discussion on the recent NCAJ Report highlighting non-lawyer perspectives on legal empowerment entitled Working with your Hands Tied Behind Your Back.

The biggest highlight of the day was Justice Constandinos Himonas of the Utah Supreme Court, who took a deep dive into Utah’s sandbox model during his presentation Let’s Reimagine How We Go About the Practice of Law. Justice Himonas discussed how the sandbox model has opened the door beyond legal paraprofessional roles in closing the access to justice gap, incorporating social workers, community organizations, and others who provide direct services to self-represented litigants. One of the more interesting programs he described was a church providing legal services in their work on the front-lines of social supports. He also shared that the United States ranks 109 of 128 countries globally in whether people can access and afford civil justice.

Zacharias DeMeola (Director of Legal Education and the Legal Profession at the Institute for the Advancement of the American Legal System) discussed Charting the Paths of Regulatory Innovation and Reform. This was a deep dive into the legal services market, the impact of the pandemic, and solutions to increase access to justice. DeMeola shared that every
single licensed lawyer in the United States would need to perform 180 hours of pro bono services each year to close the access to justice gap—currently the average is 55 hours amongst only 52% of lawyers.

The final speaker of the day was Amie Lewis (Senior Associate, Civil Legal System Modernization at The Pew Charitable Trusts). Lewis discussed ways in which technology has improved access to justice for Americans using e-filing, electronic case management, online dispute resolution, and other technology solutions.

The day rounded out with a panel discussion featuring Albin-Lackey, Annette Diamond, (Strategic Policy Counsel, Law Society of Ontario), Gregory Richard (Assistant Professor of History & Legal Studies, Winona State University), and Linda Odermott, RP®, OCP (member of the Oregon Paralegal Association) discussing the non-lawyer programs in Ontario, Minnesota, Oregon, and a broader view from around the U.S. The panel was followed by an open discussion with attendees and speakers discussing a path forward for paralegal regulation in the United States.

The Regulation Conference also featured two bonus CLE webinars. Pamela Starr, CBA, J.S.M. (NFPA Ethics Board Chair) dove into WFH...WTH? by discussing ethical dilemmas faced in the new age of working from home. NFPA Diversity, Inclusion, and Equity Committee Members Jay Williams (TBLS-BCP) and Wayne Akin facilitated a discussion on Bullying in the Workplace by discussing their personal experiences, how bullying negatively impacts working environments, and how increased acceptance of DI&E could ease the increase in bullying events.

LEADERSHIP

The Leadership Conference led by Jessica Kubiak, RP® (NFPA Leadership Coordinator) was a success with three very lively discussions and provided attendees with a wealth of knowledge and information to bring back to their local association.

The first discussion led by Brenda Cothary (NFPA Region I Director) focused on developing your skills to become a strong leader. Cothary provided a wealth of knowledge and practical tips on how you can sharpen your skills to become a success in your personal or professional leadership journey.

The second discussion led by Lisa Lynch, CRP™, CEDS (NFPA President) discussed the importance of succession planning as part of your local association’s “business as usual” model. She went over the importance of succession planning, best practices, challenges, and potential pitfalls that left attendees with information to bring back to their local associations!

Finally, the day ended with a powerful and energetic discussion led by Mindi Schaefer, M.S., RP®, OSBA, AACP (Paralegal Association of Central Ohio) on the Power of Recognition. Schaefer discussed how recognition drives employee motivation, produces a sense of achievement with employees, and fosters an environment where employees feel valued. She gave us tips and tricks on how the power of recognition can be used to increase individual employee engagement and team productivity—ultimately leading a company to higher retention.

A very special thanks to Maren Schroeder, RP®, MnCP (NFPA Director of Positions and Issues) and Lisa Vessels, RP®, CP® (NFPA Director of Paralegal Certification) for their hard-work and dedication to providing the best educational experience for all members. From Friday’s virtual happy hour to the bonus CLE sessions, this year’s Joint Conference provided more than 130 registrants an excellent opportunity to meet with new and familiar faces and to build the relationships that are so essential to the continued vitality of the paralegal profession.

JOINT CONFERENCE WAS SPONSORED BY

ABOUT THE AUTHOR

TOM STEPHENSON, RP®, Director of Membership, works as Legal Operations Director for a multinational personal finance company. Prior to working in-house, Tom worked for several top litigation law firms in Chicago as their senior managing litigation paralegal. Stephenson received his paralegal degree from Minnesota State Community and Technical College, graduated with a Master of Arts in Legal Studies from the University of Illinois at Springfield, and currently holds the PACE® Registered Paralegal credential.
2021 NFPA Annual Convention

By Julie Dod

“The time has come, the Walrus said!” While I don’t remember reading the poem, The Walrus and the Carpenter by Lewis Carroll, I have used this saying since I was a kid, and so it seems fitting that I would say it here as indeed the time has come to register for the NFPA Annual Convention in Portland, Oregon!

So, come on down! (Okay, I did watch The Price is Right with Bob Barker A LOT.) The Oregon Paralegal Association is honored to be hosting this year’s convention, and we want to meet as many of you as possible at this event, which for many of us will be our first live convention in two years. Our committee members have been diligently working for well over a year planning the CLEs, keynote speaker, workshops, fundraiser recipient, and, most importantly, the social event. Now let’s talk of these many things:

CONTINUING LEGAL EDUCATION (CLE)

This year’s CLEs will not only be useful and interesting, but they are current hot button topics that will be thought provoking, ensuring that we legal professionals will not only be current on the latest hard legal trends but also on the soft legal trends that will set us apart from our colleagues as knowledgeable, compassionate professionals in the workplace. Some CLEs you can attend:

- **eDiscovery Certification** and how the certification benefits your paralegal/practice assistant career. E-xciting to explore new talents.
- **Data Security & Data Privacy** not just for self-proclaimed nerds and geeks, but addressed in terms that will help all of us advise our attorneys on best practices to secure their clients’ data and proprietary information.
- **Privilege** - Ah – the ongoing debate – is it privileged? What kind? Maybe it’s considered work-product. Are there other privileges besides attorney-client? It’ll all be covered in this session. Phew.
- **Evidence**—We’ll have a dynamic demonstration from Fat Pencil Studio on how we can best present our best evidence in trials, arbitrations, and mediations.
- **Corporate Transparency Act** - Say what? (I’m in employment law…) Everything you ever wondered or thought about with regard to this Act will be covered—I’m signing up!
- **The Mind and Heart of the Negotiator** - Nope – this isn’t marriage counseling – but it may be useful in our personal relationships as well as our professional relationships.
- **Juror Psychology in the Age of the Coronavirus** - A veteran jury researcher and trial consultant spills the beans on the data collected on jurors during the Pandemic as to how they will view liability and damages in the future.
- **Securities and Raising Capital** - “Securities” covers more than what’s on the stock market—they’re also used to raise money for development projects and acquisitions. You’ll learn how all this works and how your attorney advises their clients on this issue. This is a “capital” idea (yes, a nod to Little Women!), and I look forward to raising my level of understanding by securing a spot at this one.
- **Settling Federal Tax Disputes** - Sounds complicated, but this super experienced lawyer will explain his techniques on advising clients on methods to mitigate tax exposure while maximizing wealth transfer to successive generations. This sounds like a win-win.
- **Litigation** - There will always be litigation – and sometimes it can be trying to find just the right CLE for this topic. We got you, though. It will be great.
- **The Cumulative Effects of Stress and Discrimination** - Nothing to joke about here – this will be an in-depth examination of the social, economic, and health consequences of discrimination. This will further our knowledge to help us all in our ally ship.

WORKSHOPS

- **Student Success: Legal Etiquette and Courtroom Decorum** - Focused on introducing paralegal students with the lessons and fine points of courtroom decorum and legal etiquette such as dress, presentation, timeliness, speaking, and electronic devices being used in the courtroom. Even we veteran paralegals could use this refresher.
- **Leadership** - Local Association leaders will share their perspectives and insights on how leadership should be inclusive to inspire growth and success in others, bringing people together to improve their agility and strengthen their resiliency. And who doesn’t need a little of this? (A dash of Ina Garten here.)
• **Dealing with Difficult People** - ehem...we work in a high-stress industry, and I think we all can say we’ve met some difficult people. Presented by a lawyer who specializes in conflict-management and who is passionate about problem solving, deal me in on this one too.

**KEYNOTE SPEAKER**

We are honored and thrilled to have Oregon’s first female Chief Justice of the Supreme Court, Martha Lee Walters, as our featured keynote speaker during the Friday luncheon. Justice Walters is an engaging, interesting, funny woman who will have meaningful insights to share with us. Justice Walters is not a native Oregonian, though, as she was born and raised in Grand Rapids, Michigan, and attended the University of Michigan (Go Blue!). She is a graduate of the University of Oregon Law School (Go Ducks!), and she practiced law for 30 years, specializing in labor and employment law, before joining the bench in 2006.

During her private practice career, Justice Walters represented PGA golfer Casey Martin in a landmark disability case against the PGA, where the Oregon Supreme Court ruled in Martin’s favor, citing that golf courses are places of public accommodation during professional tournaments and that allowing Martin to use his golf cart as an accommodation of his disability would not substantially alter the nature of the tournament.

Chief Justice Walters is a regular speaker, instructor, and author on the law and law improvement, including teaching law school classes, speaking at continuing legal education programs, and teaching for the Sakhalin/Oregon Rule of Law partnership. She will talk to NFPA members about the Importance of Equal Access to Justice and the Paralegal’s Role Towards that Goal.

**FEATURED FUNDRAISER RECIPIENT**

OPA is overjoyed to have chosen CourtCare as the Annual Convention’s fundraising recipient. CourtCare is part of the Multnomah Bar Association’s Foundation, running purely off donations. The Foundation was formed to, among other things, increase the public’s understanding of the legal system, promote civic education and participation, and to support programs related to the foundation’s purpose. CourtCare furthers the access to justice goal by allowing families to take day care out of the equation when having to go to court, and it also shields children from the stressors inside the courtroom. CourtCare has served over 18,000 children and their families since 2001. Donations are tax exempt under Section 501(c)(3).

**SOCIAL EVENT**

Oh the “Games Paralegals Play,” and we play hard because we work hard! Join us at the Punch Bowl Social Portland, a short walk from the hotel in downtown Portland for good food, great company, and an evening of games. Enjoy the beautiful view of Portland from the private balcony. Try your hand at darts. Slip on a pair of (free) bowling shoes and see how you score. Perhaps billiards or Shuffleboard is more your style. Maybe you like old-time video games (bring some quarters!). How about letting your inner star shine in your private Karaoke room? All entertainment, dinner and one “adult” beverage are included with price of admission.

**SHOPPING AND FOOD**

**CUISINE**

Portland prides itself on being a foodie city, whether it’s the Egg and Bacalhau Bake from Bake on the Run Food cart, or a vegan gluten free donut from Petunia’s Pies and Pastries, Portland really does have it all. For a variety of Portland’s famous food-cart scene check out any number of Portland’s Food Cart Pods located on 5th Avenue, 3rd Avenue, and all across Portland Pioneer Courthouse Square. For a map and a sample of what’s to eat, check out http://www.foodcartsportland.com/

If a swankier experience is what you are looking for, downtown Portland has you covered. For a delightful Pan-Asian cuisine and the most spectacular views the city has...
to offer, check out Departure Restaurant and Lounge. Located on the 15th Floor of The Nines Hotel located at 525 SW Morrison St, Departure offers that delicious farm to table experience or that end of the day handcrafted specialty cocktail. Portland’s rooftop restaurant and bar experience can also be found at the Xport Rooftop Lounge sitting atop the Porter Hotel located at 1355 SW 2nd Avenue.

For a less formal affair, check out any number of Oregon’s breweries. Repeatedly crowned as one of the best craft beer cities in the world, Portland has its fair share of microbreweries right in the heart of downtown. Whether you want a dark chocolate porter and some great bar food at Deschutes Brewery, a gluten-free pale ale from Ground Breaker Brewing or maybe even that Viva La Pineapple! cider from Reverend Nat’s Hard Cider pub, Portland has it all.

SHOPPING

One thing to remember while you are in Portland is that Oregon does not have sales tax, so shop your heart out. Earlier, we dropped a plug for heading to Portland’s famous Powell’s Books. Powell’s Books is one of the largest independent new and used bookstores in the world. Located in Portland’s refined Pearl District, Powell’s has you covered from unique socks to that hard-to-find book. You are sure to find a gift for family and friends, or maybe pick up a little something for yourself.

REGISTRATION DETAILS:

September 13: Conference Room Block Ends
September 30: Convention Registration Ends

ABOUT THE AUTHOR

While having worked in the legal field her entire professional career, JULIE DODD only began working as a paralegal 7 years ago, and only a year ago completed her Associates in Paralegal Studies. Julie currently works at Jackson Lewis P.C., a national labor and employment firm, and she loves the firm and every one of its employees across the country. Joining the Oregon Paralegal Association has been a meaningful addition to Julie’s career, especially working on the committee planning the NFPA 2021 Conference. Julie is passionate about social justice, has a loving family, and enjoys the Pacific Northwest lifestyle by hiking, skiing, rafting, and cycling, and dabbles in a little copywriting and screenwriting.

FUTURE CONVENTIONS

2022: September 15-18 at Westin Cleveland Downtown

hosted by the Cleveland Association of Paralegals

2023: DATE/LOCATION TBD

hosted by the National Capital Area Paralegal Association

HOST HOTEL - HILTON DOWNTOWN PORTLAND

The Hilton is in downtown Portland, one block from Arlene Schnitzer Concert Hall and two blocks from Pioneer Courthouse Square. Pioneer Place MAX Station is a short walk away for light rail links and the hotel is surrounded by popular Portland restaurants.

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Congratulations to these NFPA award nominees

Award announcement will take place during the Awards Luncheon at the Annual Convention.

**INDIVIDUAL PRO BONO**
- Mughda Frenandez

**JUSTICE CHAMPION**
- Aaron Bath

**OUTSTANDING LOCAL LEADER**
- Jered Brown
- Tracey Young
- Aaron Bath
- Anthony Rausch
- Kathryn Ingram

**PARALEGAL OF THE YEAR**
- Thomas Holmes
- Tracey Young
- Octavia Giadolor

**WILLIAM R. ROBIE LEADERSHIP**
- Lorri Jenkins

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**Annual Convention Exhibitor Profiles**

We look forward to visiting with all of the exhibitors at the Annual Convention in Portland. Before you arrive you might want to read more about the companies and their representatives.

We appreciate their support of NFPA, the National Convention, and the Paralegal profession.
VENDOR SPOTLIGHT

Ryan Baker
Vice President
Capitol Lien Records and Research, Inc.

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: Throughout college and following graduation I had always gained experience in Management and Marketing capacities, but had been very retail focused in each job. Eleven years ago I wanted to find where I could leverage these skills in a business to business setting. At the time I was working long hours for a rental car company and had begun searching for B2B opportunities in St. Paul. I was intrigued by the niche offerings of Capitol Lien and the types of clients they served. Capitol Lien had me visit their St. Paul Headquarters for an interview and the rest they say is history.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: Back in 1989 we had a partner who at the time worked for a company that started in 1966 when the UCC code was adopted. This was the only game in town offering public records research and they were located across the street from the Capitol building in Minnesota and the Secretary of State’s Office. Our Founder went to the MN SOS every day to gather UCCs filed, copy them, and shrink them down into a database for conducting searches.

With those UCCs came the capturing of Tax Lien information. As the business got its start the name came about organically to become partly location based and partly service driven: Capitol Lien Records and Research, Inc.

Occasionally through the years, we have been confused with ‘Capitol Records’ from the music industry in Los Angeles which is highly entertaining when it happens. That said, most professionals understand and recognize our name and refer to us in the short version: Capitol Lien.

Q: WHAT DOES YOUR COMPANY DO?
A: Capitol Lien provides accurate & timely due diligence solutions to legal professionals nationwide. Leverage our personalized customer support & years of experience to make decisions with confidence.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 62

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: $10 off your next order with Capitol Lien*. Use code NFPA21
*Offer is good for one order per company

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: We have had our employees volunteer with Habitat for Humanity and Second Harvest Heartland through the years. Also, as a company we decided to donate to 15 different charities on behalf of our clients during the holiday season to try to help in as many ways as possible for all the hardships felt in 2020 (https://capitollien.com/season-of-giving-back/)

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: I always get excited for the NFPA Annual Convention. It is one of the few times in the year I get to see a lot of people who I now consider friends after having been to so many of these conventions and kept in touch over the years. The decision to help NFPA is a simple one: We like to support the Paralegal profession. In addition to being a great way to increase awareness around the due diligence services we offer, it is a wonderful group of hard-working people that deserve to be recognized.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY
A: How Capitol Lien can help Paralegals:
• Court Research
• Corporate Services
• Registered Agent Services
• IP & Litigation Searches
• Real Estate Research
• UCC & Lien Searches
• Filings & Retrievals
• International Research

TO LEARN MORE, CONTACT RYAN BAKER AT RYAN@CAPITOLLIEN.COM
Thomas Howard
Account Manager,
Corporation Services Company

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: I first began my career as a litigation paralegal, which ultimately led me to the legal services industry.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: CSC was founded in 1899 by Otho Nowland, then president of Equitable Guarantee & Trust Company, and Christopher L. Ward. With an initial investment by Nowland, Ward, and another friend, Willard Jackson, The Delaware Incorporators’ Trust Company was created. A similar company was formed separately by Josiah P. Marvel, an attorney and then-leader of the American Bar Association, The Delaware Bar Association, and the Delaware State Chamber of Commerce. In 1920, Ward and Marvel combined their two companies under the name Corporation Service Company.

Q: WHAT DOES YOUR COMPANY DO?
A: At CSC, we like to say that we “make business itself possible.” We offer a solution for every phase of the business life cycle. We help companies form corporations and LLCs. We make it easy for them to meet their legal obligations in any of the thousands of U.S. jurisdictions

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 2,500+

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: Very excited to be an exhibitor at this year’s convention. As a long time partner of the NFPA, we look forward to this year’s first in-person convention of 2021.

TO LEARN MORE, CONTACT THOMAS HOWARD AT THOMAS.HOWARD@CSCGLOBAL.COM

Susan Clift
Area Sales Manager - IME Division
Genex Services

Q: WHAT DOES YOUR COMPANY DO?
A: Genex IME is a leader in Independent Medical Exams (IME) for workers’ compensation, auto, disability and legal clients nationwide. At Genex, we uniquely integrate hard data, clinical expertise, and rigorous QA standards to deliver an easy-to-use, trustworthy IME process so you can receive an accurate, defensible decision, every time.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: I’m very excited to be at an in-person event this year and look forward to meeting everyone!

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: Genex is involved in many volunteer activities both locally and nationwide.

TO LEARN MORE, CONTACT SUSAN CLIFT AT SUSAN.CLIFF@GENEXSERVICES.COM.
Q: HOW DID YOU GET STARTED IN THIS FIELD?

A: After graduating from college, I moved to Washington DC and started working for a boutique firm in their IT support. They had one litigation matter in Summation and my boss asked me to work with the partner to make sure he has everything he needs. I have been in ediscovery ever since!

Q: WHAT DOES YOUR COMPANY DO?

A: DISCO is the legal technology services solutions company. We improve outcomes with products Legal loves.

DISCO was initially developed at a litigation boutique in Houston. It was born out of the firm’s frustration with conventional ediscovery tools that were slow and difficult for lawyers to use. Instead of being forced to adapt our work methods to technology, we wanted to invent technology that works the way lawyers work. DISCO was the result, and today we are the fastest-growing ediscovery solution in North America.

As the leading provider of software as a service solutions developed by lawyers for lawyers, DISCO is reinventing legal technology to automate and simplify complex and error-prone tasks that distract from practicing law. DISCO has been embraced by more than 400 law firms, including 75 of the top Am Law 200, as their first choice for innovative technologies that enhance the practice of law to help secure justice and win cases.

Q: HOW MANY EMPLOYEES DO YOU HAVE?

A: 377

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.

A: In 2018, DISCO created DISCO Cares. The mission is simple, to help is human. Our Discovians continue to carry out this mission in our focus areas:

- Investing in STEM education for the next generation in underserved communities
- Supporting local families in need
- Nurturing Discovians’ passion in charitable causes

In 2020, DISCO Cares accomplished an overall contribution of $104,175, with 67% of Discovians participating in events. This includes 100% executive participation, and over 200 individuals.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.

A: I am looking forward to seeing familiar faces while also having the opportunity to meet new people!

TO LEARN MORE, VISIT WWW.CSDISCO.COM.

OREGON ZOO

Because I mentioned walruses, I have to write about our Oregon Zoo (where I saw my first walrus), located right here in Portland, on the hill near the International Rose Test Garden, overlooking the city. This is the oldest zoo west of the Mississippi and home to over 2,600 animals. About 40% of the 64-acres have been renovated over recent years, and it has won several Association of Zoos and Aquariums award. It is open seven days a week and is an easy Max train ride from downtown Portland. Visit https://www.oregonzoo.org/about/about-oregon-zoo for more information.
Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: My focus has been in marketing and sales throughout my career. I have been with ESi for 5 years where I work with our technical consultants. It is fascinating work as each consultant has a unique focus and area of practice – from electrical engineering, accident reconstruction, chemistry, materials science, mechanical engineering and so much more. Every day I learn something new.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: Our company originated in 1987 in the Chicagoland area and was named by our three founders, Edward W. Holmes, Charles R. Morin, P.E., and Robert P. O’Shea, Ph.D. They were colleagues, friends, and engineers with a mutual vision for starting a forensic engineering firm.

Q: WHAT DOES YOUR COMPANY DO?
A: ESi is an engineering consulting and forensic investigation firm comprised of Ph.D.s, engineers, scientists, and technicians who are experts in their field. With state-of-the-art testing facilities, labs, and equipment, ESi provides clients with access to a full range of engineering capabilities. Additionally, ESi now offers ESi LIVE, a technology-driven remote inspection service that delivers live inspections and post-inspection analysis sessions remotely using live streaming and advanced communication and visualization tools. ESi has over 30 years of experience solving challenging technical questions and has competencies with regulatory expertise, industry knowledge, and claims and litigation experience.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: ESi has 365 employees across 17 offices throughout the United States, including Portland area and Seattle.

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: ESi is involved with community work locally, so our contributions and volunteer efforts vary by office. Recently a group of our women engineers led a companywide campaign for donations supporting STEM (Science, Technology, Engineering and Mathematics) nonprofit organizations and programs.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: ESi is proud to be a sustaining member of the Oregon Paralegal Association and we are thrilled to be an exhibitor at the NFPA Annual Convention. We look forward to seeing you and invite you to visit us at our booth.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: ESi focuses on forensic investigations surrounding accidents, incidents, and natural disasters. We provide our clients with non-biased, science-based answers. We can scan, record, and survey scenes and equipment; and can perform a full range of specialty testing. Our technology can capture the scene of the incident and translate the data into visualizations, models, animations, and 3D VR experiences. We offer complete analysis, reporting, consulting, expert testimony, and even secure long-term storage of artifacts. I invite you visit us at our booth to learn more about how we may be able to serve you.

TO LEARN MORE, CONTACT JOANNE NOEL AT JNOEL@ENGSYS.COM
Jillian Newkirk
President
Evolution Process Service

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: I wanted to try something in a new industry, and I had a colleague that did Process Serving on the side. I started serving documents on the side as I looked for another job. I ended up liking the civil process industry so much, I decided to make it my career.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: When I started my new venture in this industry, I always would say I was evolving. Therefore, I named the company Evolution Process Service, Q: WHAT DOES YOUR COMPANY DO?
A: Process Service
Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 5 Employees, 100’s of subcontractors
Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: 10% off your first serve for conference attendees. We offer discounted pricing based on volume.
Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: I have mentored many people starting new companies. I am a consultant with marketing, software programs, networking, licensing, etc.
Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: Our company is involved with the Indiana Paralegal Association and enjoy it a lot. We hope we can meet more contacts within the association that will benefit both our company and the client.
Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY
A: We cover nationwide

TO LEARN MORE, CONTACT JILLIAN NEWKIRK AT JILLIAN@WESERVEUS.COM

PORTLAND SPOTLIGHT

Also known as Portland’s backyard, Oregon’s wine country is a short 30-minute drive from town. The varietals are world-famous, and the landscape is stunning. From fancy European stucco wineries and tasting rooms to rural barns nestled in the hills, a day touring this lovely land always promises a smooth finish. Visit https://www.oregonwine.org/visit-wine-country/regions/ for more information.

It may feel like you’re a world away, but you’ll only be 2 hours from Portland in Maupin, a quaint high desert town nestled in a canyon where fly fishing enthusiasts travel from all over the country to stand and float in the spectacular wild and scenic Deschutes River—right alongside the rafters. Rafting may be “officially” over by October, but the fishing will still be on. https://maupinoregon.com/ for more information.
Joshua Cohen
Principal
Fat Pencil Studio

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: I was doing graphics work for real estate professionals and a client asked me to help with trial exhibits to support his expert testimony in an eminent domain case (2009). At first it was just a few cases each year, but now legal work represents more than 80% of Fat Pencil’s business.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: In my first week of Architecture Grad School at the University of Oregon (Summer 2000), the professor gathered the class and said he would only allow us to use “fat pens or fat pencils” for drawings until we understood the central idea of our design project. I think the same is true in many professions—it’s easy to get sidetracked by details, so using a “fat pencil” in the early stages of a project is a great way to stay focused on the big picture.

Q: WHAT DOES YOUR COMPANY DO?
A: Fat Pencil Studio uses visual tools to help you collaborate with experts, negotiate settlements, and prevail in court. We distill key facts and themes into engaging graphics such as maps, charts, timelines, diagrams, and animation. Our real-time 3d modeling process allows complex details to be understood by everyone at the table, whether meeting in-person or online.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: Five.

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: If you’d like to explore how a visual story could help your case, but are not sure where to start, Fat Pencil can host a 30 minute case review meeting with your team, free of charge. We can also deliver a CLE presentation about visual stories at your company meeting or event.

Q: DESCRIBE ANY VOLUNTEER WORK YOU DO IN YOUR COMMUNITY.
A: I enjoy working with local schools including volunteering as judge for speech & debate tournaments, giving guest lectures about 3d modeling with SketchUp, and even building a bicycle shelter.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: It’s much easier to show rather than tell people about Fat Pencil’s work, and I prefer to do this in person as opposed to Zoom meetings. This will (hopefully) be my first opportunity in 18 months to set up an exhibit table at a conference! It’s so great that this will happen in Portland, with participants arriving from all over the country.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: Most attorneys understand the persuasive power of using visuals in trial, but only a few realize the strategic value of starting to work on them at the beginning of a case.

Last-minute trial graphics are often an attempt to “dumb things down” or “make things pretty” for a jury. Our approach is to first understand the details—however complicated—and then find ways to make things simple and clear, knowing that simple does not equal dumb, and clear is more important than pretty.

TO LEARN MORE, CONTACT JOSHUA COHEN AT JOSHUA.COHEN@FATPENCILSTUDIO.COM
Daniel Steigert  
Director of Global Business Development  
International Business Company Formation, Inc.

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: The headquarters of IBCF was located down the street from my college and had a Part Time office assistant position open when I graduated. I applied and was hired and I fell in love with the industry, the work that was involved and more importantly the relationships I was building with my colleagues and clients.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: Our founders saw an opportunity to assist with International and Offshore entity Formations. In the late 90's, offshore companies were called International Business Companies. So they created International Business Company Formation to assist mainly with Offshore formations. Over 20 years, we have expanded our service offerings and we are a turnkey corporate services firm specializing in International Corporate Services.

Q: WHAT DOES YOUR COMPANY DO?
A: We are an industry leader in International Corporate Services. We specialize in entity formations, registered agent/office services, document retrievals, due diligence searches, apostilles/legalizations, compliance plus much more. We offer these services all around the world and in all 50 States, Washington D.C and U.S. Territories.

Q: HOW MANY OFFICE LOCATIONS DO YOU HAVE?
A: We have 4 office locations. Our headquarters is in New York with branch locations in Delaware, London and Paris. These offices help facilitate a smooth flow of corporate work to the UK, EU and beyond! With these office locations, we are able to offer clients around the clock services to international corporate services.

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?.
A: On International requests, we are happy to offer a 10% discount on our service fee for new clients and a 15% discount on our service fee for existing clients. We are also happy to offer 2 years of registered agent in the United States for the price of one year! The yearly rate will depend on the volume of units. The rate will also be guaranteed for the life of the entity and includes new agent units and change of agent units. Please contact us for more details.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: First, I am excited to be back in person. There’s nothing better than speaking with people face to face and building a relationship that way. Secondly, we love the NFPA structure and how it’s an association that works with each state paralegal association.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: Clients are beyond excited when we complete their requests under budget and ahead of schedule. More importantly, their excited when the request they thought was impossible is actually completed. They only thing clients are mad about is they didn’t use us sooner!

TO LEARN MORE, VISIT WWW.IBCF.COM
Kevin Nelson
Business Development Representative
Intoxalock

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: I started in the House Arrest industry in its infancy in 1990. At that time, I worked for a company that placed a device on your ankle and in your home and it monitored presence and absence. The device in the home also had an alcohol monitor attached to it. In 2013 I joined Intoxalock with my sole focus being Ignition Interlocks which are installed in cars and focus on the individuals not driving a vehicle after consuming alcohol.

Q: WHAT DOES YOUR COMPANY DO?
A: manufacture, install and monitor Ignition Interlocks in motor vehicles.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 615+

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: Intoxalock Select which includes $100.00 install rebate, waiving of 1st lockout, waiving of early termination fee along with other discounts and benefits

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: I personally volunteer at North west furniture bank which assists individuals who are homeless, domestic violence victims or low income by assisting them with furniture for their residence after the leave their programs.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: In 2019 Intoxalock stopped 164,000 vehicles from being started by individuals who had a BrAC of .08 or higher.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: Intoxalock has been in business for over 30+ years. We provide services in all 50 states and have over 4000 service centers nationwide.

TO LEARN MORE, CONTACT KEVIN NELson AT KNELSON@INTOXALOCK.COM.

PORTLAND SPOTLIGHT

The Portland Japanese Garden is a cultural wonder nestled in the hills of Portland—not far from the Rose Garden and the Zoo—providing a tranquil, urban oasis. This beauty was designed in 1963, encompasses 12 acres with eight separate garden styles, and includes an authentic Japanese Tea House, meandering streams, walkways, and an amazing view of Mt. Hood. The garden organization was created specifically to cultivate inner peace as well as peace between peoples and cultures. Restore your spirit here. Visit https://japanesegarden.org/ for more information.

There are so many things to do and see in and around Portland while you’re out here attending the conference—we hope you take the opportunity to take in some of our sites and fares. In case you missed an earlier article about other places to explore, see below for more of What to do in Portland.
David Dingwell
Investigator / Marketing & Business Development
McDonald & Associates Investigations / Custer Agency

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: Word of Mouth during a Continued Education Course at the University of Washington.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: The company name is from the owners’ name.

Q: WHAT DOES YOUR COMPANY DO?
A: McDonald & Associates Investigations offers a wide variety of investigative services to the Risk management Industry with a wide variety of clientele such as Self-Insured Employers, TPS’s, private citizens, and Government Agencies. Medical Record Retrievals/ Comprehensive Background Reports/ Recorded Statements/Surveillance/Social Media Checks/Digital Forensics.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 15

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: Contact us and we will defiantly offer FREE Consultations to your case.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: We always look forward to meeting new people, learning different individual’s professions while promoting the company to new potential clients.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: At the moment, volunteer work is limited due to different regulations and restrictions presented to the community for Safety purposes.

TO LEARN MORE, CONTACT DAVID DINGWELL AT DDINGWELL@MCDONALDSERVICES.COM.

VENDOR SPOTLIGHT

PORTLAND SATURDAY MARKET

If you have time during your visit to Portland, don’t miss the opportunity to take a stroll around Portland’s famous Tom McCall Waterfront Park. The park is located along the Willamette River, which divides the city’s east and west and is crossed by its ten bridges.

That is why Portland is also referred to as the Bridge City. While you’re there, head on down to Portland’s renowned Saturday Market. Find handmade arts and crafts and sample some cuisine from Portland’s world-famous food carts. Despite its name, Saturday Market is open every Saturday from 10:00 am to 5:00 pm and Sunday from 11:00 am to 4:30 pm from the beginning of March through December 24. Admission is free.
Erin Martuscelli
Vice President of Client Relations
Naegeli Depositions & Trial

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: A family friend, who was a court reporter, inspired Marsha to become a court reporter. She started her business in 1980 and the rest is History! Naegeli Deposition & Trial has become one of the top ten court reporting firms in the country with offices in multiple cities.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: Naegeli is a family name, which means Carnation in Swiss.

Q: WHAT DOES YOUR COMPANY DO?
A: NAEGELI Deposition & Trial holds your hand every step of the way by providing outstanding litigation support nationwide. Be a part of the NAEGELI advantage by using our free remote streaming services with a live technician who monitors your assignment from start to finish to ensure an effortless experience! Our services include court reporting, videography, videoconferencing, trial presentation, transcription, copying/scanning, and interpreters in 200+ languages. It is our privilege to serve you!

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 55

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: When scheduling a service with us, just mention being an “NFPA Member” and Naegeli will credit your invoice $100.

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES IN YOUR COMMUNITY.
A: Our President & CEO, Marsha J. Naegeli, has served on the following boards:
- Supreme Court Child Abuse Board
- Portlandia Board of Directors - A business club that promotes women in business
- Board of Directors for Twin City Bank

TO LEARN MORE, VISIT HTTPS://WWW.NAEGELIUSA.COM/.

PORTLAND SPOTLIGHT

LAN SU CHINESE GARDEN

If you are looking for a more tranquil experience, head on over to Portland’s Lan Su Chinese Garden. Inspired by the famous classical gardens of Suzhou, head down the Gardens to experience the tranquility of blooming flowers and enjoy an amazing cup of Tao Tea. The Lan Su Chinese Garden is located at 239 NW Everett in the heart of downtown Portland. For more information, visit https://lansugarden.org/about-the-garden.
Gary Crowe
NAPPS Administrator
National Association of Professional Process Servers (NAPPS)

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: NAPPS was formed in 1982 by a concerned group of business owners who discovered a proposed change to Federal Rule 4 was being made that would effectively eliminate process servers.

Q: WHAT DOES YOUR COMPANY DO?
A: NAPPS is the largest non-profit association for process servers in the United States. With over 2,300 members we have professional servers where you need them.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: As a national non-profit we are not here to sell a product but to promote our free website where 2,300 professional servers can be found.

Scott Vogt
General Manager, Business Development
UNISEARCH, INC.

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: The owner thought I would be great at selling Unisearch and it’s been an amazing 6 years.

Q: WHAT DOES YOUR COMPANY DO?
A: Unisearch, Inc. is a public records research firm specializing in searching, filing and retrieving public documents. We offer an extensive range of Registered Agent, Corporate, and Uniform Commercial Code/Lien Services to the legal, financial and business community in all 50 states and internationally.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: 65

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: Come talk with us, we are raffling off a $50.00 Visa Gift Card.

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES IN YOUR COMMUNITY.
A: We sponsor a local food bank each year.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: Always love getting out and meeting new people while sharing the Unisearch story.

TO LEARN MORE, VISIT WWW.NAPPS.ORG
TO LEARN MORE, CONTACT SCOTT VOGT AT SCOTT.VOGT@UNISEARCH.COM.
**Brian Johnson**
Senior Account Executive
Registered Agent Solutions, Inc.

**Q: HOW DID YOU GET STARTED IN THIS FIELD?**
A: I became friends with the EVP of CSC and was asked to join the company.

**Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?**
A: Our name comes from the primary service we provide.

**Q: WHAT DOES YOUR COMPANY DO?**
A: Nationwide registered agent and corporate services.

**Q: HOW MANY EMPLOYEES DO YOU HAVE?**
A: 1000+ (RASi was acquired by Lexitas Legal in 2020)

**Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?**
A: All NFPA members and attendees receive special pricing for Registered Agent services if they contact Brian Johnson directly at bjohnson@rasi.com or 512-815-7979

**Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.**
A: I look forward to seeing old friends in person again and introducing our services to new members and attendees.

**PORTLAND SPOTLIGHT**

**JUST OUT OF DOWNTOWN**

If you have the time and want to get out of town to explore the beauty of Oregon, hop on Interstate 84 and head east just 30 miles outside of downtown Portland to experience the magnificent Columbia Gorge and the amazing 620-foot-long Multnomah Falls. These iconic and world-famous falls are host to more than 2 million visitors each year and represent a sample of the beauty of Oregon. These spectacular views are not something to be missed. While you are there, grab lunch at the Trailside Grill Restaurant or just grab a snack and coffee and take the easy hike to the falls for a spectacular view.

If you are still seeking more adventure, an hour and a half drive outside of downtown Portland will bring you to Mount Hood ski resort and the infamous Timberline Lodge. Images of Timberline Lodge are most commonly recognized from the 1980 Stanley Kubrick movie The Shining. Constructed in 1837, Timberline Lodge stands at the south slope of Mount Hood at an elevation of around 6,000 feet and is a designated Historical Landmark. So, whether you’re seeking to hit the slopes of the only year-round ski area in North America, or you just want to grab a bite and stay warm by the fire, Timberline just may be the place for you.

If you are looking for a slightly less adventurous experience, take a drive through the Willamette Valley’s wine country. This picture-perfect experience through the pastoral landscape may be just the relaxing ticket you need. Oregon has more than 725 wineries. Offering varietals from the more commonly known Pinot Gris and Pinot Noirs to the exotic Arneis and Grenach Blanc, Oregon’s wineries really do have it all. For more information visit https://www.oregonwine.org/. And bonus, if you fly Alaska Airlines, Oregon wines fly free home. So, stock up on that sales tax-free experience and take a little piece of Oregon home with you.
Q: HOW DID YOU GET STARTED IN THIS FIELD?

A: Table 8 is a network of independently owned court reporting and legal video firms located in the U.S. and Canada. The firm owners are working court reporters dedicated to technical excellence, exceptional customer service, and the highest ethics in our industry.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?

A: A group of firm owners were seated together while attending the National Court Reporters Association’s annual Firm Owners Executive Conference. They were an “enthusiastic” group. Eventually, the NCRA speaker admonished them, saying, “Table 8, you are having too much fun over there. You need to quiet down.” The name stuck.

Q: WHAT DOES YOUR COMPANY DO?

A: Table 8 is a national network of court reporters, videographers, and trial support companies.

Q: HOW MANY EMPLOYEES DO YOU HAVE?

A: We have member firms in all 50 states, Canada, and the United Kingdom.

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?

A: Stop by our booth and enter to win a gift card!

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.

A: Members of Table 8 are active in our state and national court reporter associations as well as various community groups. A small sample: Founder, director, and Cleveland member Dave Tackla is the pianist for his church. Washington member Phyllis Craver Lykken is president of the Washington Court Reporters Association and chair of NCRA’s STRONG task force. Lisa Migliore Black is president of the Kentucky Court Reporters Association, responsible for NCRA’s Ethics First program, and a member of NCRA’s STRONG task force too.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.

A: The NFPA convention is a perfect match for Table 8. Our member firms cover the entire country, and we are the independent, friendly court reporting firms that NFPA members rely on every day. Thank you for inviting us to your party!

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.

A: How many times has your attorney had to travel out of state or out of the city and have gotten a court reporter/videographer by way of a Google search, only to get COD’d after having to wait three weeks for a transcript? On top of that, the transcript quality is abysmal. No More. Contact the Table 8 member firm in your area, and they will hook you up with other member firms that will treat you as if you were one of their own clients. No more numerous calls and the hassle of scheduling. Just one contact and we’ll do the rest. Let us do the work and handle the details and know that you’re getting the best reporters and trial support around the country.

TO LEARN MORE, CONTACT CATHERINE TEACH AT CAT@LNSCOURTREPORTING.COM.
Jay Jenkins
Partner/VP Client Services
T-Scan Record Retrieval

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: I answered an ad. Twenty years later, I am still here.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: Tony Tamfer was the original owner of the company. Thus, the “T” in T-Scan.

Q: WHAT DOES YOUR COMPANY DO?
A: Intelligent Record Retrieval

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: Currently, 115 and growing.

Q: DO YOU HAVE ANY SPECIAL OFFERS OR PROMOS THAT YOUR COMPANY WOULD LIKE TO SHARE WITH NFPA CONVENTION ATTENDEES?
A: Pickles. There is nothing better than a jar of pickles.

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: Over the last year, we have supported Food Lifeline as we all faced the challenges of the Pandemic.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: Washington State Paralegal Association and Oregon Paralegal Association members are a big part of our continued success. We are proud to be a part of the NFPA family. The national convention is one that we try not to miss!

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY
A: Hmm...I have broken both feet, both big toes, one ankle, both legs, my left knee, my right arm, my right index finger, a bunch of ribs and my nose twice. Not all them at once. Also, every member of my immediate family has broken their nose. It is a Jenkins thing.

TO LEARN MORE, CONTACT JAY JENKINS AT JAY@TSCAN.BIZ

VENDOR SPOTLIGHT

PORTLAND SPOTLIGHT

If you are looking for an outdoor experience, just two miles west of downtown Portland, hop on Oregon’s light rail system and head to Washington Park. Washington Park is home of the famous Portland International Rose Test Gardens with over 10,000 bushes of beautiful roses. It’s no wonder Portland is also known as the Rose City. The gardens are free to the public and open year-round. While you are there, take a stroll down any number of trails.

Washington Park is home to more than 400 acres of beautiful outdoor trails and includes the Oregon Zoo. The Oregon Zoo is the oldest zoo west of the Mississippi River and features over 1,800 animals and more than 230 species. For hours and ticket formation, check out https://www.oregonzoo.org/
Samantha Wiggins
Financial Advisors
Waddell & Reed

Q: HOW DID YOU GET STARTED IN THIS FIELD?
A: My college finance instructor introduced me to her best friend in the field when I asked about how to pursue a career in finance. I have been with that company ever since.

Q: WHERE DID THE NAME OF YOUR COMPANY COME FROM?
A: In 1937 when World War I veterans Chauncey Waddell and Cameron Reed founded the company.

Q: WHAT DOES YOUR COMPANY DO?
A: Provide financial services and, education on financial planning, retirement, Medicare, social security and investments.

Q: HOW MANY EMPLOYEES DO YOU HAVE?
A: I have two employees.

Q: DESCRIBE ANY VOLUNTEER WORK YOU OR YOUR COMPANY DOES.
A: I work with compassion which is an organization that provides free medical and dental to people that cannot afford these services. I have worked with this organization for 10 years on setting up clinics.

Q: DESCRIBE YOUR EXCITEMENT OR DECISION TO BE AN EXHIBITOR AT THE NFPA ANNUAL CONVENTION.
A: I have loved my clients that are paralegals. I have sought out referrals from individuals in this field because they're the type of community leaders I strive to be like and learn from.

Q: PLEASE TELL US ANYTHING ELSE YOU WANT US TO KNOW ABOUT YOU AND YOUR COMPANY.
A: My company seeks to help the community find empowerment in their finances. I want to take the guess work out of life changing decisions and let them focus on what matters most. Clients can become a better spouse, a better child, and a better friend, if they put their energy in what matters.

TO LEARN MORE, VISIT SWIGGINS.WRADVISORS.COM.

Samantha Wiggins
Financial Advisors
Waddell & Reed

PORTLAND SPOTLIGHT

OAKS AMUSEMENT PARK

If it’s adventure you seek on your stopover in Portland, grab a bus or bus and hop on over to Oaks Amusement Park, located just 3.5 miles south of downtown Portland. Oaks Park, as it is known, is one of the oldest continually operating amusement parks in the country. Whether it’s the tamer bumper cars you’re after or the big thrill of the AtmosFEAR 360, Oaks Park has a little something for everyone. For specials and ticket information check out https://www.oakspark.com/
**Vendor Directory**

**The TASA Group**
(800) 523-2319 / www.TASAnet.com
Contact: Heather Williamson

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