

THE NATIONAL PARALEGAL

SPRING 2021
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REPORTER

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REGULATION

CERTIFICATION

NFPA

ALL
MEMBERS

LEADERSHIP

JUNE 11-13

ONLINE

JOINT
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NATIONAL
FEDERATION
of
PARALEGAL
ASSOCIATIONS Inc.

NFPA-The Leader of the Paralegal Profession™

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President's Message



DEAR MEMBERS,

Unity is defined in the online dictionary as “The state of being united or joined as a whole,” and it’s more informally defined as having “oneness of mind.”

While we recognize that right now is one of the most divisive times this country has ever seen, we can have unity within the NFPA, standing together on the positions that it takes related to the paralegal profession. And right now, as we forge ahead into NFPA 2.0, unity is more important than ever.

WHY DOES THE NFPA NEED TO BE UNITED, AND IS IT EVEN POSSIBLE?

Unity is essential in any organization, family unit, company, or association. As the late poet Mattie Stepanek said, “Unity is strength...when there is teamwork and collaboration, wonderful things can be achieved.” 18th century poet Friedrich von Schiller said, “Even the weak become strong when they are united.” Isn’t that what we want for the NFPA, a strong organization in which wonderful things can be achieved?

IT'S POSSIBLE TO ACHIEVE AND MAINTAIN UNITY.

I do believe that it’s possible to have unity within the NFPA, notwithstanding the divisiveness of today’s world. Local association members are diverse in so many ways,

including race, color, creed, culture, political affiliation, area of law, years/degrees of education, certifications, etc. So what is it that unites us as the National Federation of Paralegal Associations? What are our common ideals and goals? You don’t have to look much farther than NFPA’s committees, governing documents and position statements to see what’s important to NFPA, as they are centered around our core values.

DIVERSITY, INCLUSION, AND EQUITY.

In 2017, the Diversity, Inclusion, and Equity (DI&E) committee was created, with its main purpose to create policy ensuring that NFPA is not only diverse, but is also inclusive and promotes equity. The DI&E Committee has become a force in this organization, writing articles, creating webinars, and preparing agenda topics with those goals in mind. Every issue of NPR has at least one article related to diversity, equity, and/or inclusion, including articles on race, ethnicity, sexual orientation, and restorative justice. In 2017, after our colleague Heather Heyer died standing up to injustice in Charlottesville, NFPA overwhelmingly voted to approve the creation of the Justice Champion Award, which was largely drafted by the DI&E Committee. And in 2019, DI&E championed a new type of NFPA CLE credit that can be used as an ethics credit to maintain the PACE® and PCCE® credentials - the DI&E credit. Finally, the

NFPA 2.0 strategic plan incorporate goals related to DI&E, ensuring that the NFPA continues its evolution to a more diverse, equitable and inclusive organization.

PARALEGAL REGULATION AND ACCESS TO JUSTICE.

NFPA takes the position that paralegals have an essential role in the delivery of legal services, no matter the area of law in which they work. To that end, NFPA has a position statement on Regulation of the Paralegal Profession and a position statement on Non-Lawyer Practice, advocating for the regulation of the profession to allow paralegals to expand their services and be a major provider of legal services to those who otherwise couldn't afford them. In addition, NFPA has supported various states' expanded role paralegal programs by providing statements or even appearing before state Supreme Courts, which it did in Minnesota in 2020.

ETHICS.

We believe that legal professionals must be ethical, and to that extent, we have a Model Code of Ethics and an Ethics Board set up to evaluate and prepare opinions related to submitted ethics inquiries. NFPA requires PACE® and PCCE®-certified paralegals to continually refresh their knowledge of ethics by taking ethics CLEs, and these are provided bi-annually at Joint

Conference and the Annual Convention, as well as offered for "on demand" consumption on the website, evidencing NFPA's commitment to ensuring that our members are well-versed in ethics.

PROFESSION DEVELOPMENT.

NFPA strongly advocates for paralegals to become and stay educated so that they can provide the highest quality legal services possible. NFPA has a deep commitment to education. Examples of efforts to support paralegal education include NFPA's Education Coordinator, which liaises with the AAfPE (American Association for Paralegal Education), as well as the ABA Liaison who works with the ABA's Standing Committee on Paralegals related to their paralegal education program approval process. Finally, as mentioned previously, NFPA provides much Continuing Legal Education (CLEs) for its members and non-members alike.

CERTIFICATION.

NFPA's crowning jewels are the PACE® and PCCE® certifications, which we hold up as the most effective exams in the industry at demonstrating a paralegal's level of competence. We believe that paralegal certification is a worthy goal that evidences a paralegal's commitment to the profession, as well as their commitment to achieving a standard of competency.

This list could go on, but as you can see, although there may be disagreements among member associations about the myriad of details related to these topics, the NFPA has multiple overall goals and values that should and do unite us.

Being united is more important now than ever, because multiple challenges lie ahead for our organization. The pandemic has hit NFPA and its member associations in multiple ways, including loss of membership as law firms and legal departments stop paying for memberships, necessitating the creation of virtual events rather than in-person events, and loss of vendor sponsorships as companies reduce their marketing budgets.

For NFPA to continue to thrive, we need a united Federation, committed to ensuring that NFPA's core values and goals move forward. As individuals, we may disagree about many things, but as NFPA members we can come together and unite around NFPA's vision and goals for our profession.

Lori J. Boris, RP®, MnCP
NFPA President

Director of Marketing Message



ALOHA!

Many of our lives have undergone serious transformation over the past year. Paralegals are well equipped to navigate the most complex issues facing real-time challenges – it is what we do on a daily basis. While the pandemic affects everyone in a unique way, we are still one community that will get through this together.

The Mission of the National Paralegal Reporter is to provide NFPA members with substantive legal and current information about our Federation and the paralegal profession. Your Editorial Team led by Becky Reedy and our Editor Rachel Daeger, IOM, CAE, are fully committed to putting together this quarterly publication for readers like you. In these dire times, we are most appreciative of our faithful advertisers, subscribers and readers who contribute to this publication.

Being upbeat in a pandemic is a challenge, but focus on the many good things in life and the values you believe in. This issue highlights paralegal superstars who were recognized at the 2020 NFPA Convention.

We also recognize some NFPA members who were featured by the American Bar Association. Along with these amazing paralegals, we feature stories that help you professionally. NFPA's Diversity, Inclusion, and Equity Committee contin-

ues to share personal stories to help us understand ways to improve productivity while being respectful to each other.

Over the coming year, NFPA's Marketing Team hopes to champion information and content sharing through our communication platforms as we recognize restrictions imposed by social distancing.

With the volume of our content publishing, we need you to help us to continue to be current with trends and staying connected. We need content, creativity, stories to share a common connection and supporting the paralegal profession. We are rewriting this chapter in our professional careers as we go through these challenging times together. Submit your content and it will shine light on the power of unity as we social distance.

As we navigate the uncharted path ahead, we encourage you to stay connected. We are connecting paralegals on social media. Join us on social media and be part of a community which offers you the chance to connect with other paralegals from across the country. "Like" our Facebook page for the latest NFPA news and join the conversation with like-minded professionals. Connect with us on LinkedIn, and see what others are sharing by following us on Twitter. Please also take a moment every week to read the News You Can Use and stay current with what is trending within NFPA.

The months ahead look promising, but unprecedented challenges still linger. We are fully committed to sharing articles that benefit you, because our work continues and creativity endures the finest in each and everyone of you.

The Editorial Committee extends their sincere wishes for your safety, and the safety of your families and professional communities. Take care.

LIVE ALOHA.

RONELL B. BADUA, AACP
DIRECTOR OF MARKETING

NFPA confirms President-Elect



As part of NFPA's new strategic plan, the position of president-elect was created. The President-Elect will work closely with the President to learn the roles and responsibilities to ensure continuity of leadership. At the end of this two-year term, the President-elect shall become President and serve for one two-year term. The President-Elect will become President at the NFPA 2022 Convention.

After a special election held among the members, Lisa Lynch, CRP™, CEDS was elected into this new position.

Lisa currently works as an in-house paralegal for Cushman & Wakefield, a global leader in the commercial and multifamily real estate industry in Dallas, Texas. Her role focuses on litigation, eDiscovery and corporate governance.

In 2015, Lisa was elected to the NFPA's Board of Directors as its Vice President and Director of Marketing. In this role she had many accomplishments, including increasing non-dues revenue and brand awareness, modernizing the design of *National Paralegal Reporter*, and co-chairing the committee that was instrumental in convincing the American Bar Association to change its definition of a paralegal to no longer identify the term "legal assistant" as synonymous with paralegal. In 2019, Lisa was elected to the NFPA's Board of Directors as its Region II Director.

Lisa has been involved with the Dallas Area Paralegal Association (DAPA) since 2004. She served as DAPA's President in 2014 and held other positions including President Elect, NFPA Primary, NFPA Secondary, Vendor Advisor, as well as serving on many committees. She has also been a CLE speaker at many DAPA and student events. In 2014, Lisa was presented with the DAPA Paralegal of the Year Award. She is also a member of Paralegal Division of the State Bar of Texas and sat on the El Centro Paralegal Advisory Board.

Lisa participates in DAPA's mentor/protégé program and is a volunteer with the Dallas Volunteer Attorney Program and other community service programs benefiting non-profits such as the North Texas Food Bank, Juliette Fowler, TangoTab and The Stewpot.

Lisa obtained her Paralegal Certificate from the Professional Development Institute at the University of North Texas. In 2011, Lisa was certified by NFPA as a Core Registered Paralegal, becoming one of the first 16 CRPs in the State of Texas and initial 148 paralegals in the nation who passed the pilot exam administered at 12 test sites across the country. Most recently, Lisa became CEDS certified through ACEDS (Association of Certified eDiscovery Specialists).

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Microsoft Power BI

By Pam Richardson

IS IT TIME TO ADD A DATA ANALYTICS TOOL TO YOUR LEGAL TOOLBOX?

Do you wish you had a way to highlight the volume of activities managed by your team on a monthly basis by

- (a) type,
- (b) department,
- (c) client or other party,
- (d) team, or
- (e) all of the above?

Are you looking for a way to easily monitor the workload of each member of your team so that you can immediately identify a team member who might need more support or who is experiencing a decline in assignments? Do you need an impressive professional visual to help organize data to present to key decision makers in your company that can be updated with the click of a button? If you answered yes to any of these questions, it might be time to consider identifying Key Performance Indicators and adding a data visualization and analytics tool to your legal toolbox!

KEY PERFORMANCE INDICATORS “KPIs”:

You may have noticed news articles and discussions trending across all industries around Key Performance Indicators “KPIs” which are data points used to track activity and identify growth or declines which help you make better business decisions. Leaders across most industries are asking their teams to provide examples of objective evidence to help better understand their business such as:

- Comparisons that show how team performance has changed over time
- Increases or declines in efficiency, effectiveness, personnel performance, resource utilization, or compliance
- Progress made or slowed towards a specific desired result
- Growth or decline in (a) demand for certain services, (b) new business relationships or (c) need for expertise in specific areas

FIRST STEP - IDENTIFY QUANTIFIABLE DATA:

In order to track performance, you need data, and the challenge is that legal work is hard to quantify in a format conducive to analysis. This is largely because so much of what we do includes activities such as editing clauses, discussing complex matters with each other and our clients, conducting research, or performing risk analysis; all of which is largely unquantifiable. However, there is always data which can be captured, and while the data isn't going to provide a complete and 100% accurate picture of the work and all the complexities, there is value in taking the time to collect it, analyze it and monitor it over time.

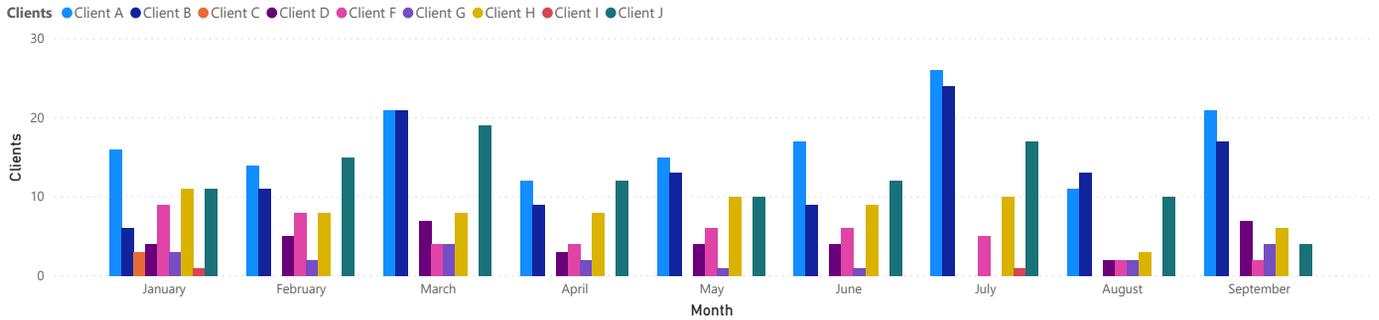
When determining which data to analyze, it's important to remember this motto: Don't let the perfect be the enemy of the good. Try working with the data that you have available through existing systems at your company or data which can be easily collected. Start by focusing on the technology platforms your company uses that might provide you with data. For example, you may utilize a contract management system which could produce

reports which can include the number of contracts executed by contract type, department, other party, and the attorney or paralegal assigned to work on the contract.

Your finance team might use a procurement system which could generate data about your clients and the amount of work they have generated each month over the past year and previous years all of which might be useful if studied. The analysis of this data can provide the kind of insight that will help your team make better decisions related to staffing and work assignments or identify issues related to specific clients, vendors, subcontractors or other departments. Analysis of this data will help you stay one step ahead of positive or negative trends arming you with valuable “business intelligence.”

SECOND STEP - SELECT A DATA ANALYTICS TOOL:

You will need to select a technology platform to transform your specific quantifiable data (KPIs) into reports on a regular basis and there are many on the market. The Microsoft Power BI business analytics platform is one you may want to consider. It is fairly easy to use by a novice with no data analytics background and it can be self-taught by watching the tutorials provided or other free training videos available online. It provides an efficient way to quickly upload data, transform it based on selected criteria, and produce professional visuals that you can share with your team and other key decision makers at your company. Also, the report creation capability provides a large number of template reports (bar graphs, pie charts, line graphs,



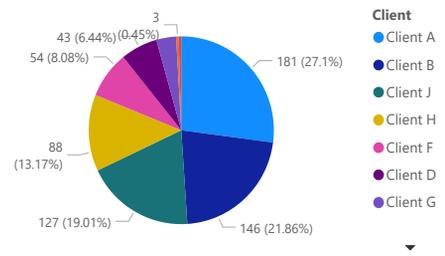
Workload



668

Year to Date

Clients



etc...) and the default color palettes and text fonts are already pleasing to the eye, which means you don't need graphic design experience to produce a professional looking product. It is affordable for a small to mid-sized law firm or legal department (under \$10.00 per month per user) and they also offer a free trial so you can test drive it first. The product works with data collected in Excel but is also compatible with other formats and the reports can be exported into PDF or Powerpoint for sharing with others or to add to a presentation.

For more information about Microsoft Power BI including pricing and the free trial click on the link here: <https://powerbi.microsoft.com/en-us/>. Microsoft provides their own tutorials here: <https://docs.microsoft.com/en-us/power-bi/fundamentals/webinars> but you can also find many free online if those don't appeal to you. I found one offered by Davidson University to be very helpful, it is offered free through

the web platform edX, just click on the link here: <https://www.edx.org/> and type "Microsoft Power BI" into the search bar.

FINAL STEP: MASTER THE TECHNOLOGY:

Regardless of which technology platform you choose, allow yourself the chance to learn the necessary skills at your own pace. My suggestion, try out several different on-line tutorials to identify an instructor who presents the material in a way that makes sense to you. If the instructor or course is too technical or moves too slowly or too fast, move on to the next one until you find one that works for you. Give yourself time to learn the new platform and don't expect to master it right away especially if you haven't used this type of technology previously. Soon enough you will be creating impressive reports which bring value to your team and your company, and you will have a new area of expertise and a skill to grow and expand on in 2021!



ABOUT THE AUTHOR
PAM RICHARDSON is a Senior Contracts Manager at a gene therapy company in Cambridge Massachusetts and is a member of the Massachusetts Paralegal Association. She was recently elected Clerk

of the MPA and also serves as Corporate Division Chair. She has a BA from Framingham State University and a Masters in Legal Studies from Northeastern University School of Law.

Corporate Transparency Act

by Jim Nash and Keith D. Sheppard, United Corporate Services, Inc.

On January 1, the National Defense Authorization Act for Fiscal Year 2021 was enacted into law. The bill includes the Corporate Transparency Act (the “CTA”) which creates a beneficial ownership registry within the U.S. Department of the Treasury’s Financial Crimes Enforcement Network (“FinCEN”), requiring certain corporations and limited liability companies to report information on their “beneficial owners” to FinCEN.

WHAT INFORMATION IS REQUIRED BE REPORTED?

Beneficial owners and companies must report a list of beneficial owners as well as the following for each beneficial owner: 1) legal name, 2) date of birth, 3) current residential or business address and 4) Government issued identification number.

WHAT ARE THE REQUIREMENTS OF THE CTA?

The CTA requires corporations and limited liability companies to disclose to law enforcement and others with legally mandated anti-money laundering responsibilities (for e.g. financial institutions) information on who is the real, natural person (a.k.a. beneficial owner) who owns and controls an entity at the point of formation and update such information upon any change. This rule reflects a growing international trend to require disclosure of beneficial ownership and creates a compliance regime similar to that of many other countries.

WHO IS FINCEN?

FinCEN is a government bureau that works to prevent and punish money

laundering and related financial crimes of criminals and terrorists networks. They also track suspicious persons and activity by researching mandatory disclosures for financial institutions.

FinCEN receives its duties from the United States Congress and the director of the bureau is appointed by the Treasury Secretary

WHAT IS A BENEFICIAL OWNER?

The CTA defines a beneficial owner as an individual who, directly or indirectly, through any contract, arrangement, understanding, relationship, or otherwise 1) Exercises substantial control over an entity or 2) Owns or controls at least 25% of the ownership interests in an entity and 3) Receives substantial economic benefits from the assets of a corporation or limited liability company. A “beneficial owner” does not include:

- a minor child (the information of the parent or guardian must be reported instead);
- an individual acting as a nominee, intermediary, custodian or agent on behalf of another individual;
- an individual acting solely as an employee of a reporting company;
- an individual whose only interest in the reporting company is through inheritance; or
- a creditor of a reporting company.

WHO WILL HAVE ACCESS TO THIS INFORMATION?

Federal, state, local and tribal law enforcement would have access to the in-

formation for use in authorized investigations as would financial institutions (with customer consent) that have legally mandated anti-money laundering obligations. Note, the CTA will not require states to maintain a separate beneficial ownership information registry.

ARE THERE EXEMPTIONS?

The CTA explicitly exempts:

- Companies that employ more than 20 people, report revenues of more than \$5 million on tax returns, and have a physical presence in the United States;
- Most financial services institutions, including investment and accounting firms, securities trading firms, banks, and credit unions that report to and are regulated by government agencies such as the Securities and Exchange Commission, the Office of the Comptroller of the Currency, or the FDIC; and
- Churches, charities, and other nonprofit organizations.

WHAT WILL BE THE RESPONSIBILITIES OF STATES ON HANDLING THE NEW REPORTING REQUIREMENT?

The CTA will require states to notify filers upon initial formation or registration of the federal requirement to provide beneficial ownership to FinCEN. States will have two years after the effective date of the regulations governing the CTA to begin providing such notice. States must also provide filers with the reporting company form created by the secretary of the Treasury and must also update their websites to notify filers of the federal requirements under the CTA.



WHEN IS THE REPORTING REQUIREMENT EXPECTED TO TAKE EFFECT?

The U.S. Treasury must pass and put rules into effect by December 31, 2021, at which time reports will commence being required.

WHAT IS THE GRACE PERIOD FOR EXISTING COMPANIES TO SUBMIT THEIR INFORMATION?

Starting in 2022, existing companies will have two years to submit initial reports while individuals forming or registering new companies will be required to submit reports at the time of formation or registration.

IS THERE A PENALTY FOR NON-COMPLIANCE?

Any party that intentionally fails to comply with the reporting requirements of the CTA may be liable for fines of no more than \$500 for each day that there is a willful failure to report complete beneficial ownership information and such parties may be subject to aggregate fines of up to \$10,000 or a prison term of up to two years.

HOW DOES THIS CHANGE HOW ANNUAL REPORTS ARE FILED?

Companies will be required to submit annual reports that identify the company's beneficial owners and changes in beneficial ownership.

WHAT SHOULD COMPANIES PREPARE FOR?

Consult with your attorney on the impact of the new laws and evaluate how your company can remain in compliance.

ABOUT THE AUTHORS



JIM NASH serves as the Business Development and New York City Operations Manager for United Corporate Services, Inc. Jim is a former Paralegal

Manager with 30+ years of experience in the corporate and structured finance law firm arena. Jim received his MBA from Fordham University and is a long-term supporter of several paralegal associations. Contact Jim at jim.nash@unitedcorporate.com.



KEITH SHEPPARD is the Marketing/Business Development Manager for United Corporate Services, Inc. and former Corporate Paralegal Manager. Keith received

his Bachelor of Science degree in Paralegal Studies from St. John's University. As a corporate paralegal and manager with over two decades of experience in the legal services field, Keith has developed an awareness for how to assist lawyers and fellow paralegals with corporate filings and due diligence. Contact Keith at keith.sheppard@unitedcorporate.com

THE NATIONAL PARALEGAL REPORTER

The Reporter has long been a valued communication tool providing in-depth, thoughtful articles of interest to the entire NFPA membership. You are encouraged to write on the following topics:

- Professional Development
- Work/Life Balance
- Technology
- How To – Tips and Tricks
- Ethics
- Diversity and Inclusion
- Day in the Life of...
- News from the local associations – awards, pro-bono activity, etc.

Articles can be 750 to 1,000 words with appropriate images, charts, etc. Text submitted as a word document and images as high resolution .jpg or .pdf files. All material should be emailed to Ron Badua at vpdmkt@paralegals.org

All in a Day's Work: Work from Home Chronicles

By Ronell B. Badua, AACP

The traditional workplace has evolved in the face of social distancing. Today, many have pivoted from working in an office to telecommuting, and families have transformed their homes into virtual classrooms for the little ones. It has been a balancing act. Childcare, distancing learning and remote working have blurred home-life and work-life. It is a disorienting and potentially isolating time for many.

As the world rapidly changed, many said farewell to their onerous commute to work and were no longer bound to a physical office. They transformed their homes and found designated workspaces to go about their workdays.

The unfamiliar territory of full-time working from home (WFH) is the litmus test we never anticipated. WFH created a creative culture and new experience globally. Productivity and efficiency transformed to a new norm as workplace inclusion included pets in the shadow of virtual meetings, air fryers became a distraction as your taste buds waited for lunch to be ready and the television seemed to magically turn on during the day. Oh, the distractions! The reality is, times have changed and work-life balance remains elusive. For employees, the benefits of WFH are obvious, but challenges are inevitable.

If you are working in an office, chances are you might be working from home. Tele-

commuting was on the rise for decades, way before the pandemic, as technological advances increased, making it easier to WFH.

This article was written to add a bit of levity as we simultaneously work at home and find ourselves encountering contradictions to our daily lives. Remote work can be challenging, invigorating, and may now be the present and future of how we work. There is slight comfort knowing that you are not alone and that we are going through this together.

Welcome to . . . work from home chronicles, where the in-home work experience has changed.

It's 7:50 in the morning, and you receive multiple texts from your team. "Anyone having email issues or trouble logging on?"

Or how about, that awkward silence after you have introduced yourself on a call and the pre-call chatter/check-in is done while waiting for the host to dial in.

Is this the new normal?

EFFECTIVE ROUTINE

Start your day by devoting time to personal hygiene, similar to what you used to do pre-pandemic. A daily routine will help you create a natural rhythm to be productive throughout the day. Like working in an office, establish working

hours each day. Determine what time of the day you feel more productive and save that energy for important tasks. Understanding when to quit for the day will allow yourself to maintain a healthier work-life balance. Work with your supervisor if you need flexibility when deadlines or other circumstances require you to extend or cut down your daily hours.

DRESS FOR SUCCESS

Your 'loungewear' may be making you feel too comfortable as you WFH. Inject some bright-colors into your workwear, and your mood might change a little. Set the standard. Dressing up is critical, especially during video conferences. Dress up in your fanciest clothes just to get some use out of them and it just might help relieve some WFH boredom. Wearing a designer aloha shirt and shorts is a trend that is slowly emerging – where I am from in the middle of the Pacific Ocean.

DISTRACTED? IT IS OK TO TAKE A PAUSE

Part of being a paralegal is the ability to pay attention to detail and working from home can often lead to distractions. I can relate and have become easily distracted nowadays. When life intervenes, excuse yourself to regain your sanity in between meetings and projects. Take some time to breathe, regroup, recharge and get back in the zone.



WORK IN THE GARDEN

Many paralegals are experiencing significant pressure and increased workloads working from home. If you have a garden at home, embrace WFH and reserve a couple of hours outside as a way of getting out of the house from your dedicated workspace. Find a relaxing spot to work or relax. Enjoy the change in scenery.

TREAT YOURSELF

Often, we would snack as we work at our desk in the office. One way to motivate yourself is to treat yourself as you WFH. I like to trick my mind into thinking that I have a box of chocolate (of course limiting myself to three pieces) in the fridge for after I complete a project or major task. Something as simple as this helps impose a better work-life balance instead of over indulging throughout the day.

DATA AND PRIVACY

You might be privy to important and confidential information; keep that information secured. Secure your home router and avoid public Wi-Fi. Encrypt sensitive data in emails and on your device. Personally, I like to separate work and personal devices to carve out boundaries between work and home life (also helps to avoid distraction from easily shopping online or reading the news). Keep your operating system

and installed applications up-to-date. Modern software generally will check for and apply security patches automatically.

Keep family members away from work devices. In paralegal school, we were taught to lock our computers when we stepped away from our desks. Similarly, enable automatic locking to protect your unattended device. Keep your home workspace as secure as you would in the office. Bring your laptop inside if working from your backyard when you go in to make lunch.

RELOCATING

Increased flexibility from working remotely may benefit employees; however, you should consider issues if you decide to move or want a change in scenery as you telecommute. Before relocating, contact your Human Resources professional and inquire about factors you should take into consideration and consider compliance issues on how your job may be affected, your pay, benefits and taxes before making a move.

NETWORK

Now that you have settled into the new norm, hold on to your dear friends (not literally). The pandemic has increased anxiety, impacting our mental health. Social distancing has reduced our ability to interact with everyone around us. Maintain a connection with the people you trust.

Check in with them. Make a call instead of texting. Your friends or even colleagues will appreciate hearing your voice as we continue to navigate a drastically changing world.

JOB HUNTING?

Many companies are hiring at-home paralegals for temporary or short-term employment. When applying for a paralegal position, be sure to read the job description carefully and accurately prepare your resume to reflect your experience, skills and education. If you do not have paralegal skills, think of positions that you have held like the duties of a paralegal or the job description. Your skills might transfer well to a paralegal position. Also, use common sense when applying for a position – do your research about a company.

Paralegals are supervised by an attorney. Strong communication is key to being a successful work from home paralegal. As you work independently from home, check-in frequently and effectively communicate with your supervising attorney. Empathy plays a role in flexibility. Offer respectful radical candor, be honest about accepting responsibility for challenges in the workplace, and co-create solutions to overcome situations that prevent you from being productive. A boost in communication builds a stronger working relationship with everyone you work with and creates a healthy work culture.

Personally, WHF is what I consider to be an adventure. By this time, we have nearly figured out the basics of video meetings and mastered our multi-tasking skills or even found a new hobby. The everyday, small things of being in an office is something you are unable to do at home. Void are the spur-of-the moment dim sum lunches with friends as we found ourselves in Chinatown for lunch. Gone are the rants and side conversations with my secretary, as we were typically ‘the last to know.’ The festive gatherings are now memories of the past with hopes everything will lighten up in the distant future. The impromptu aloha Friday snacks we shared in the office to end the week on a sweet note and welcome the weekend is now a self-treat to cautiously step out and reward myself. In-person staff luncheons are now virtual personal growth and self-development training workshops [with a local and award-winning author and life expert]. Vacation out of state/country is now a much needed staycation. These small spontaneous actions that used to make a productive workday are nearly just memories of the good ‘ole days.

BEING PRODUCTIVE DURING THE PANDEMIC

Feeling accomplished with work, but anxious or tired when you’ve have logged off from work? You begin to realize you keep postponing the things you want to achieve and find yourself sinking into the couch, and that feeling is attributing to your boredom. Mental health plays a huge role in how well you feel and affects your productivity. There are many ways to feel energized and relaxed:

Try a meditation and download apps to teach you breathing techniques to help relax you after a long day.

- Reclaim a hobby.
- Clean out the garage or your closet. Donate what you do not need.
- Call a friend or family member.
- Read a book.
- Create a Zen garden in your backyard.
- Treat yourself and celebrate.
- Learn to bake.

- Be proactive. Find opportunities that could positively impact you or your family. If you have kids, help them find available scholarships to apply for college.
- Plan a special evening at the dinner table. Turn Fridays into a special occasion, dress up and have a nice three-course dinner at home with the people you live with.
- Improve your professional development, build new skills.
- Volunteer as a NFPA Coordinator and develop your leadership skills.
- Study for NFPA’s credential exam. Create a virtual study group.
- Or! How about, write an article and share your WFH experience in the *National Paralegal Reporter*.

**RONELL B. BADUA, AACP
DIRECTOR OF MARKETING**

Need CLE?

Have a personal goal of professional development?

NFPA has a calendar for that!

<https://www.paralegals.org/i4a/calendar/>

Did you know that the NFPA Calendar is packed full of great education opportunities including local events that often have virtual registration options. It’s worth a scroll.

Have an event to share?
Use the “Submit” button to post your event.

APRIL 2021				
Monday	Tuesday	Wednesday	Thursday	Friday
				1
4	5	6 Lion and Medical Bill Reduction Requests: Paralegal Tips and Tricks	7 CLE Seminar: Fundamentals of Legal Research	8 Paralegal Power Skills: Productivity and Communication
11	12 What Paralegals Need to Know About Wills and Trusts	13 The Ultimate Guide to Workers' Compensation for Paralegals	14 National Affairs Director	15 The Paralegal's Guide to Researching Parties, Witnesses and Jurors
18 Ethics for Paralegals	19	20 A Paralegal's Guide to Drafting Business Contracts, Organizational Documents and More	21	22
25	26	27 Handling the Divorce Case: From Start to Finish: A Paralegal's Guide	28 The Complete Personal Injury	29 A Paralegal's Guide to Renewing Title Commitments, Execute Documents and Surveys

NFPA JOINT CONFERENCE 2021

THE PIECES ARE COMING TOGETHER!

Daily Conference Schedule

This year's Joint Conference will deliver the same top-quality speakers and educational content our members and other attendees have come to expect. We are working on finalizing the agenda and will provide an update as soon as possible.

Certification Conference

The Certification Conference provides necessary resources and information to guide and mentor RPs, as well as the duties of the Certification Ambassadors.

Items for discussion will include marketing of the exams; studying/form study groups for the exams; tips on how to navigate through the renewal process; and ways to meet CLE requirements.

Leadership Conference

The Leadership Conference is designed to help local leaders deal with day-to-day operations.

Regulation Conference

The Regulation Conference will cover types of regulation, status of regulatory efforts, new regulation developments, and regulating non-lawyers in the legal profession.

NFPA's 2021 Joint Conference will be held virtually on

June 11-13, 2021.

By going virtual, this change affords all members the opportunity to access valuable information regarding association leadership, certification and regulation within the paralegal profession from the comfort of your own home or office.

The annual NFPA Joint Leadership, Certification, and Regulation Conference is one of the most popular and most beneficial gatherings for paralegal leaders in their local association and their community. Attendees have the opportunity to share and network with professionals regarding association leadership, certification and regulation within the paralegal profession.

All three conferences are open to NFPA Members.

Questions?

Conference Contact: Tom Stephenson, RP®, Joint Conference Chair, membershipdir@paralegals.org

Sponsorship/Exhibiting Opportunities:
More information to come. Contact events@paralegals.org.

The 2021 Joint Conference Committee is hard at work finalizing the details for the Conference and will update information on this page as it becomes available.

Legal Sector Added Nearly 5,000 Jobs To Kick Off 2021

Arriana McLymore , Reuters Legal

The United States added 4,800 legal services jobs in January after months of stagnant growth in the industry, the U.S. Labor Department's Bureau of Labor Statistics reported Friday.

There were 1,126,000 legal sector jobs in January, the government's monthly jobs report showed, marking a 0.45% increase from December's seasonally adjusted figure. The sector beat the broader non-farm job market, which saw 0.03% growth last month.

The January increase comes after legal employment dipped in December for the first time since the arrival of the pandemic last spring, when employment in the sector dropped to its lowest point in two decades. With the latest figures, legal services jobs have declined 3.1% year-over-year.

Nicole Gable, chief of staff of the U.S. professional recruitment and solutions unit at The Adecco Group, said that the shift to remote work in the pandemic has encouraged firms to hire more technical workers and other non-lawyer staff, even if some of those jobs may be temporary.

"There are a number of new, non-lawyer jobs that are crucial now," Gable said.

Krystal Champlin, a law firm consultant at RJN Consulting, said law firms are now being more intentional about their hiring practices after scrambling

to respond to the uncertainties of the pandemic for nearly a year.

"2020 was the year of the pivot. Firms were doing whatever they needed to do to stay afloat, so that they could keep their business for the long haul," Champlin said.

A return to long-term hiring strategies may also bring new job losses, however.

This week Morrison & Foerster laid off 4% of its staff in the U.S. despite what it has characterized as a successful 2020, citing lessons about staffing needs it learned from the pandemic. Expense-cutting in the form of pay cuts, layoffs and other austerity measures helped boost profits at many law firms last year, according to industry consultants and early law firm financial reports, and many firms may want to keep it that way.

Some firms that are struggling financially, meanwhile, may hold on to workers in order to qualify for government pandemic aid, Champlin said.

Overall, Champlin said she expects there to be continued growth in legal services jobs in the first quarter of the year as firms tap consultants, lawyers and staff to execute new strategic plans for the remainder of the pandemic and its aftermath.



Source: [https://today.westlaw.com/Document/I6da03ed067fc11eb8cda9b540a7a05a4/View/Full-Text.html?transitionType=CategoryPageItem&contextData=\(sc.Default\)](https://today.westlaw.com/Document/I6da03ed067fc11eb8cda9b540a7a05a4/View/Full-Text.html?transitionType=CategoryPageItem&contextData=(sc.Default))

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Bullying In The Workplace: How “Me too” Can Morph Into “Us Too”

by Wayne D. Akin and Jay M. Williams, TBLS-BCP

My name is Wayne Akin and I have been bullied. I have also been a bully. I still remember his name. Not the person who bullied me, but the person I bullied. His name was Carl and he never did anything to me, bothered me, or bullied me. His crime was that he was just like me. He stayed with his small clique of friends, like I did with mine. I don't know how he was with his group, but I was social, fun-loving, comedic. I sang in choir and performed in the yearly musical. But I wasn't cool and not one of the “In” crowd. I assume Carl was the same, as I didn't know much about him nor he me. My only interaction with him was in P.E.

In my school, 7th and 8th grade boys shared the same locker room, the same showers, and often participated together regardless of aptitude or ability. So it was only a matter of time before Carl and I came together with jocks, cool kids, and the “in-crowd.” I can't remember what sport we were playing but Carl and I were both equally un-athletic, and made enough screw ups to draw attention to us as the reason our team lost. It was decided that Carl and I would fight each other. Neither or us wanted to but we were surrounded with no way out and being pushed at each other. It happened. I got close enough and punched him. I have no idea whether I hit him hard or not. He did not go down. But I remember the look of wonder and sadness on his face. Why was I doing this, his eyes seemed to be asking. But then I heard the cheers of the crowd. A crowd I had never cared about before and knew I wouldn't be a part of ten minutes later. But in that moment, I was in that group, and it felt good. I hit Carl again, hoping he

would fall down so it could be over. And eventually my third punch landed in his midsection and he crumpled to his knees. I was declared the winner. They cheered me. I was patted on the back. It felt GOOD.

Soon I was back with my group, Carl went back to his, and neither of us was in with the in-crowd. I tell you this story so that you will know that many of us have been bullied, and many of us have been the bully. Being one doesn't negate being the other.

My name is Jay Williams and I have been bullied. My childhood was difficult at best. Being slight in size, I was almost always the last one chosen for group sports activities. I also exhibited more effeminate actions and traits than other boys. I even tried out for the junior varsity cheerleading squad in high school. I still recall walking home from school with a friend of mine during sophomore year and a car with some guys pulled around the corner ahead of us. One got up and asked me, “Are you a fag?” “Are you gay?” The next thing I remember, I was staggering down toward a busy street with a great amount of pain over my left eye. I collected my wits to prevent being hit by a car and somehow made my way back to the sidewalk. I was definitely wailing at this point. He then put his arm around me as I was walking down the sidewalk, half-heartedly apologizing to me. One more punch to my eye and then he went back to his friends in the car. My friend, bless her heart, tried to console me the rest of the walk home.

My story may be a common one on the playground, but bullying scenarios have different actors and locations. Bullies and



bullying can occur in playgrounds and classrooms, cafeterias and lunchrooms, houses and factories and law firms. Ultimately, bullying is about us and them, the “other” and making that other feel less than. Growing up, I often thought that the bullying would end once I got “out there,” “out there” being the adult world where people collaborated and talked of big ideas.

ADULT BULLYING

While we strive daily to be the best possible versions of ourselves, we have to face the truth that the workplace can often make us feel like we're teenagers again. The cliques, gossip, and overall negativity come streaming back into our lives, just when we thought we had shut that door for good.¹

Adult bullying can come in an assortment of forms. There are about five distinctive types of adult bullies. A narcissistic bully is described as a self-centered person whose egotism is frail and possesses the need to put others down. An impulsive bully is someone who acts on bullying based on stress or being upset in the mo-

ment. A physical bully uses physical injury and the threat of harm to abuse their victims, while a verbal bully uses demeaning language and cynicism to debase their victims. Lastly, a secondary adult bully is portrayed as a person that did not start the initial bullying but participates in afterwards to avoid being bullied themselves.² Adult bullies are more likely to use verbal bullying than physical bullying but the result is the same: their attempt to humiliate and gain power over their target.³

While Wayne says he hasn't been goaded into a fist fight with a co-worker while surrounded by the top team of lawyers and paralegals at any firm he's worked for, he has been a victim of workplace bullying and may have been the bully himself. According to the Workplace Bullying Institute (www.workplacebullying.org) in American workplaces:

- 19% are bullied
- 60.3 million workers affected
- 69% of bullied workers are women
- 70% of perpetrators are men⁴

WORKPLACE BULLYING

Bullying is generally defined as unwelcome behavior that occurs over a period of time and is meant to harm someone who feels powerless to respond. Verbal bullying includes teasing and threatening to cause harm, according to stopbullying.gov.⁵ It can include such tactics as verbal, nonverbal, psychological, physical abuse and humiliation. This type of workplace aggression is particularly difficult because, unlike the typical school bully, workplace bullies often operate within the established rules and policies of their organization and society. In most cases, bullying in the workplace is reported as having been done by someone who has authority over the victim. However, bullies can also be peers and occasionally, subordinates.⁶

Research has also investigated the impact of the larger organizational context on bullying as well as the group-level processes that

impact the incidence and maintenance of bullying behavior.⁷ Bullying can be covert or overt. It may be missed by superiors; it may be known by many throughout the organization. Negative effects are not limited to the targeted individuals, and may lead to a decline in employee morale and a change in organizational culture.⁸ It can also take place as overbearing supervision, constant criticism, and blocking promotions.⁹

Ellen Walser deLara, a family therapist, professor of social work at Syracuse University, and author of the book *Bullying Scars: The Impact on Adult Life and Relationships*, writes that adults bullied as children or teens can suffer for years afterward with trust and self-esteem issues, as well as psychiatric problems. She calls the phenomenon adult *post-bullying syndrome*.¹⁰

Bullying in the legal profession is believed to be more common than in some other professions. It is believed that its adversarial, hierarchical tradition contributes towards this.¹¹ Women, trainees and attorneys who have been qualified for five years or less are more impacted, as are ethnically diverse lawyers and lesbian, gay and bisexual lawyers.¹²

According to a 2017 nationwide survey by Harris Poll on behalf of CareerBuilder, two in five LGBT workers (40 percent) report feeling bullied at work, 11 percentage points higher than the national average of all workers combined. Fifty-six percent of bullied LGBT workers report being bullied repeatedly. One in five LGBT workers have experienced health issues because of bullying at work, while 41 percent of LGBT workers have left a job because they were

bullied. Seventy-two percent of LGBT workers do not report their bullying to HR.¹³

The authors of this article are both members of the LGBT community. Wayne is also short, over-weight, and disabled. Jay, as referenced above, has been slight in build for most of his life, even into adulthood. Wayne recalls when he was being bullied, it never even occurred to him that it was bullying. He can now see how the bullying made him more and more miserable, increasingly worried and anxious about going into work, and how he began to doubt himself. "I began to think I wasn't as good as I thought I was," Wayne said. He doubted his own abilities. Ultimately, he started taking anti-depressants. He called in sick, calling those days his "mental health days." The stress and anxiety affected his health.

This is what workplace bullying does. It knocks the wind out of your sails. Your self-esteem takes a hit. Jay began second-guessing tasks he used to do without thought. Finally, you are less trusting of your own instincts and judgment and your work product goes down the drain, along with your billable hours. And like many victims of bullying in the workplace, I never told anyone.

Race also plays a role in the experience of workplace bullying. According to the Workplace Bullying Institute (2007),¹⁴ the comparison of reported combined bullying (current + ever bullied) prevalence percentages in the USA reveals the pattern from most to least:

1. Hispanics (52.1%)
2. Blacks (46%)
3. Whites (33.5%)
4. Asian (30.6%)

In 2018, the International Bar Association (IBA) (<https://www.ibanet.org>) conducted a worldwide study to bring harassment and workplace bullying to the forefront of the legal profession. The results of the study were published in the report, *Us Too? – Bullying and Sexual Harassment in the Legal Profession*, in May 2019. The main take-away from this study was that



the legal profession had a problem. Nearly 7,000 individuals from 135 countries and from across the spectrum of legal workplaces participated and the results confirmed that bullying and sexual harassment are rife in the legal profession.¹⁵

Approximately one in two female respondents and one in three male respondents had been bullied in connection with their employment. One in three female respondents had been sexually harassed in a workplace context, as had one in 14 male respondents.

Horacio Bernardes Neto, the IBA president, said, “following the global #MeToo movement, the legal profession has regularly been called upon to advise other sectors on these issues. Our ability to advise effectively and drive broader societal change is undermined if we do not address the risk of hypocrisy.” He said further that, “[i]f the law is to remain in proper standing with the global community, its practitioners must be of good character. Addressing the widespread bullying and sexual harassment among us is an important step in safeguarding the long-term vitality of this essential profession.”¹⁶

According to the IBA Study, in 57% of bullying cases and 75% of sexual harassment cases, the incident is never reported. The targets of the bullying and/or harassment didn’t report it due to the status of the perpetrator, fear of repercussions, and the incident being endemic to the workplace. Policies and training do not appear to be having the desired impact. Respondents at workplaces with policies and training are just as likely to be bullied or sexually harassed as those at workplaces without them. In the U.S., the IBA Study found that 45%-51% of respondents identified as being bullied, and 24%-35% of respondents identified as being sexually harassed.

ABUSIVE WORKPLACE BEHAVIORS

Common abusive workplace behaviors are:¹⁷

- Threat to professional status – including belittling opinions, public professional

humiliation, accusations regarding lack of effort, intimidating use of discipline or competence procedures.

- Threat to personal standing – including undermining personal integrity, destructive innuendo and sarcasm, making inappropriate jokes about the target, persistent teasing, name calling, insults, and intimidation.
- Isolation – including preventing access to opportunities, physical or social isolation, withholding necessary information, keeping the target out of the loop, and ignoring or excluding.
- Overwork – including undue pressure, impossible deadlines, and unnecessary disruptions.
- Destabilization – including failure to acknowledge good work, allocation of meaningless tasks, removal of responsibility, repeated reminders of blunders, setting target up to fail, and shifting goal posts without telling the target.

Probably the most common behaviors revolve around the threat to professional status and overwork. This is something Jay experienced from a supervising attorney. The workload increased exponentially after employment began so many tasks could not be completed timely. This led to belittlement that spilled over to questioning professional credentials. This was punctuated with the supervisor exclaiming, “You better not think about sitting for another board certification exam!”

The humiliation continued on another occasion when Jay relied on another staff member to prepare exhibits for a deposition. Unbeknownst to Jay, that task was not completed and was not discovered until the time of the deposition the exhibits were needed for. The supervising attorney had to stop the deposition in order to get the exhibits. Instead of passing the blame to the other staff member, Jay took to complete the task without offering any explanation. While copying the exhibits, the su-



perceiving attorney (with the client behind her) berated Jay for being incompetent.

Some instances can make humiliation take a dramatic turn toward injury to the psyche. When participating in a case review meeting prior to a supervising attorney leaving for vacation, a task was given to schedule an arbitration for mediation by a certain date. When speaking with the mediator, Jay was told that date was not available on his schedule, however, he could schedule for a couple of days after. Jay agreed to the date. While reviewing the cases the ensuing week, the supervising attorney asked for the mediation date.

When told the requested date was not available on the mediator’s schedule and was set for a couple of days later, the attorney cried out, “You mother [expletive deleted], I told you to schedule for a certain date.” Again, Jay explained the date was not available with the mediator. Soon after Jay shut down and said nothing during the remainder of the meeting. Jay then went to HR and explained what happened. Jay also replayed the scenario with his immediate supervisor, as well as with one of the name partners of the firm who supervised the section. While everyone sympathized with Jay’s feelings, all agreed there was nothing that could be done to change the atmosphere. Shortly afterward, Jay submitted his resignation letter and transitioned to another firm.

Research by the Workplace Bullying Institute, suggests that the following are the ten most common workplace bullying tactics

and the percentage of time they are used:¹⁸

1. Falsely accused someone of “errors” not actually made (71%).
2. Stared, glared, was nonverbally intimidating and was clearly showing hostility (68%).
3. Unjustly discounted the person’s thoughts or feelings (“oh, that’s silly”) in meetings (64%).
4. Used the “silent treatment” to “ice out” and separate from others (64%).
5. Exhibited presumably uncontrollable mood swings in front of the group (61%).
6. Made-up rules on the fly that even they did not follow (61%).
7. Disregarded satisfactory or exemplary quality of completed work despite evidence (discrediting) (58%).
8. Harshly and constantly criticized, having a different standard for the target (57%).
9. Started, or failed to stop, destructive rumors or gossip about the person (56%).
10. Encouraged people to turn against the person being tormented (55%).

Signs of workplace bullying can range from absenteeism, lack of organizational commitment, anxiety, depression, job burnout, to varying degrees of psychological distress.¹⁹ Research in the *Journal of Management Studies* showed a direct link between what is known as “learned helplessness” and depression. There are also cases of bullying induced post-traumatic stress and even suicide.²⁰

So, isn’t workplace bullying illegal? Aren’t there laws against this sort of thing? These are good questions, and the answer to them is the same, “it depends.” A person who is mean is not necessarily breaking the law, especially if they are mean to everyone. You may have heard someone described as an “equal opportunity offender.” But this person’s behavior might not constitute unlawful harassment.



For bullying in the workplace to be illegal, it must be tied to another protected category, such as gender, race, color, national origin, or religion. In other words, an individual is bullied because of being a woman or person of color. Bullying could also be tied to other types of civil or criminal wrongdoing, such as assault, in which case appropriate legal action would need to be taken. Even without a specific federal law against general bullying in the workplace, law firms and other employers can implement policies and procedures that prohibit this type of behavior and seek to prevent it. Bullying can create very low morale and severely damage productivity within any organization, so it is in everyone’s best interests to do everything possible to stop it.²¹

DEALING WITH WORKPLACE BULLYING

Below are tips for dealing with workplace bullying:

1. Take care of yourself outside of work. Spend time with your friends and family and lean on them for support. Consider seeking professional help from a therapist or counselor, someone who understands trauma.²²
2. Take notes. Document interactions with the bully. Keep these notes in a private place and use them if you need to show the bullying pattern to a third party, such as your company’s HR department.²³
3. Rise above, but don’t be afraid to confront. At first, try to minimize time spent around the bully, and ignore any bullying behavior. But sometimes, enough is enough, and you need to confront them. Explain how

the negative treatment makes you feel and ask them to stop. Sometimes perpetrators are not aware of the effect their actions have. Fifty-three percent of workers who were bullied at work confronted their bully, and 20 percent said the bullying stopped.²⁴

4. Do your research. Does your company have a policy about bullying, mistreatment, verbal abuse, or anything similar that you might be able to reference? It can only strengthen your case if you’re able to point to that language if you decide to make a complaint. Also consider seeking legal advice to confirm whether or not your situation might qualify as harassment or otherwise offer some sort of legal recourse.²⁵
5. Bring in the experts. Seventy-two percent of workers who are bullied at work do not report it to HR. Your HR team is trained in dealing with workplace conflict and can step in to help you solve the issue.²⁶
6. Look for a new job. The reality is that most bullying situations (77% according to WBI’s survey) end in the target leaving their job, whether because they got fed up and quit or they ended up getting fired. Even if you do pursue some of your other options before you actually decide to leave—speaking to HR, for example—it can help to have an offer or at least prospects lined up in case things go awry.²⁷

In an email to Wayne, Kieran Pender, Senior Legal Advisor, Legal Policy and Research Unit, International Bar Association stated that, “[w]e have been pleased to see widespread commitment to positive change in response to the Us Too? report. We have worked closely with many major law firms, such as Clifford Chance and Baker McKenzie, who have rolled out a number of internal campaigns in response to Us Too?. We have also worked with the American Bar Association, and particularly its Young Lawyer Division, to drive change.”

Schoolhouse Rock always started their

Saturday morning segments with cartoon kids growing up and getting bigger. The orange haired boy in the red shirt and blue pants had the final words of the opening, "Knowledge is Power." If you are being bullied, there are things you can do as referenced above to stop the bullying or at least protect yourself. If you are a bully, maybe you will see yourself and your actions and decide to change. We hope you do change. If you work in management, let this be a call to you to get a policy on the books, provide training to all attorneys and staff, and stop bullying before it starts.

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WAYNE D. AKIN began his paralegal career in 1999 after 13 years working in law firms as a records clerk, word processor, and legal secretary. He retired in 2018 due to a disability. As a paralegal,

Wayne served as a Board member, Treasurer, Vice President, and President of the Oregon Paralegal Association. He is a previous recipient of NFPA's Outstanding Local Leadership Award. Wayne has also served on the national level as NFPA's Vice President and Director of Positions and Issues from 2004 to 2008. He is passionate about diversity issues (and the Oxford comma) and is a current member of NFPA's Diversity, Inclusion, and Equity Committee.



JAY M. WILLIAMS, TBLS-BCP, is the owner of and freelance paralegal with JMW Paralegal Services, LLC. He earned his paralegal certificate from ESS College of Business in Dallas in 1990 and

began his legal career at the Federal Public Defender's Office in Fort Worth. Since then, Jay has accumulated a diverse legal background, gaining experience in federal criminal defense; real estate; tax; wills and estate planning; mergers and acquisitions; employment; probate; business and commercial litigation; bankruptcy; and homeowner's association representation. Since 2000, he has focused his career on civil and personal injury litigation cases. In 2019, he transitioned to a freelance role. Jay joined the Dallas Area Paralegal Association (DAPA) in 2003 and has served in many capacities, including President for the 2008 term. He became a Board Certified Paralegal in Civil Trial Law in 2013 and Personal Injury Trial Law in 2015. Jay is a member of NFPA's Diversity, Inclusion, and Equity Committee. He also serves on NFPA's Marketing Team as the Corporate Partner Coordinator.

Portland

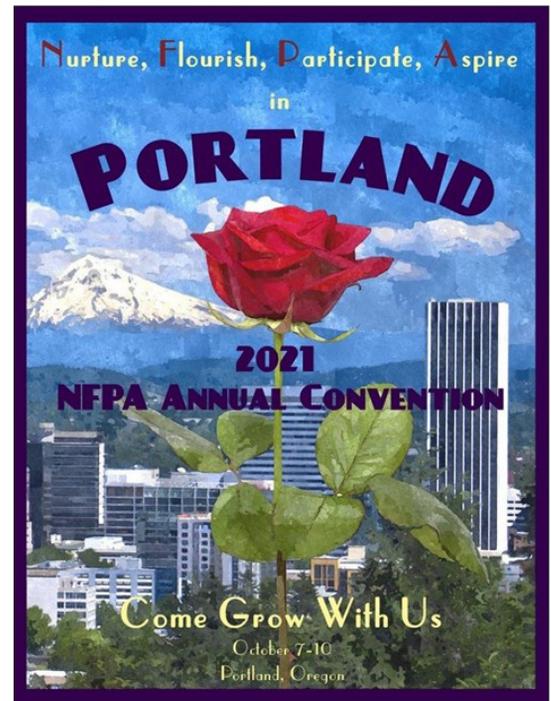
2021 NFPA Annual Convention

by Catherine Teach, Julie Dodd, and Teresa Chrisinger, RP®

Greetings from the rose of the Pacific Northwest, Portland, Oregon! The Oregon Paralegal Association is honored and excited to be the host of the 2021 NFPA National Conference. While there is much that could be said here about the current COVID-19 pandemic, WFH this past year, zoom meetings and virtual conferences, we will focus here on the hope that this year's conference will be an in-person event in our beautiful city. For all those who are suffering from the virus, supporting first responders and teachers, and who have lost loved ones, our hearts go out to you and wish you recovery, comfort, and perseverance.

There is so much to say about Portland, it is hard to know where to start. You may all know about Portland because of our famous food carts, craft beers, and – rain. Everything you have heard is true and not true. True, our downtown and our surrounding cities have made homes for local food truck fare and pubs, creating a hometown feel no matter what part of town you're in. Not so true, is that it rains all the time. According to several weather websites, Portland averages around 42 inches of rain a year, which is just a few inches more than the national average. We love the rain here because it keeps our Oregon lush and beautiful, and more often than not, if you wait ten minutes the rain subsides. But there's more to Portland than just food, beer, and rain.

While you may know that just outside of Portland is the world headquarters for Nike, did you know it is also the world headquarters of Columbia Sportswear and KEEN Footwear, and the U.S. headquarters for Adidas? No wonder we love adventure here. With our beautiful Gorge, Multnomah Falls, Mount Hood, scenic rivers and coastline, and our wine country, there is plenty to walk, hike, ski, fish, swim, and sip here. But the adventure is not limited to outside the city. Nike sponsors Biketown, which provides bright orange bikes-for-rent that are parked conveniently around city streets for easy access. For several years now, Portland has been listed as one of the most bike friendly cities in the country. When you're here, grab a bike (or





take a nice stroll) around our Eastbank Esplanade Trail Loop (just 2.5 miles), traversing over one or all our downtown bridges. And while you're out, ride (or hop on our Streetcar) over to the Portland Art Museum to see a world-class collection of Asian art, or keep going to the world's largest independent bookstore, Powell's Books. After browsing books, sipping some deliciously strong Bridge City coffee, wander around our Pearl District for more food, shops (where you'll find KEEN's Garage), and art.

Speaking of art, Grimm, Goonies, and Groening, oh my! Yes, the modern-day Grimm fairy tale television series, Grimm,

was filmed here in Portland, alongside another series, Portlandia, which was a comedy series that spoofed Portlanders for our reputation as being eccentric hipsters (Paralegal hipsters?). And, remember Goonies? The classic 1985 coming-of-age film about a group of misfits who find a pirate's long-lost treasure? This was filmed just two hours from Portland in Astoria, one of the oldest cities in our state, resting at the mouth of the Columbia River where it meets the Pacific Ocean. Just across the river from Astoria is the Long Beach, Washington peninsula, where Lewis & Clark ended their famous journey. For The Simp-

sons fans, Portland is where it all started! Matt Groening, creator of The Simpsons, was born and raised here in Portland and set the show in the city of Springfield, Oregon, just an hour and a half south of Portland. He chose Springfield because, anticipating the show would be a hit, there are 29 towns across the states named Springfield.

But you don't come to a convention just for the food, sights and adventure, there's the serious business of getting together with your peers, sharing what you know, and finding out what you don't know. Read below for more details about our





conference line-up (still in progress!) and more fun, amazing, and interesting things to do in and around our city.

SESSIONS AND VENDOR EXHIBITORS

Throughout Thursday and Friday, you will have access to important and up-to-date information from a variety of vendors. Breakfast and breaks will be near these exhibitors, giving you dedicated time to spend visiting with these professionals, discussing your and your firms' needs, grab some product samples and enter drawings for some fantastic give-aways.

The line-up of speakers will provide a vast array of CLE sessions on timely topics you have come to expect from your Association. You will gain insights from expert panelists, celebrate your profession, and most of all – be inspired to grow! There

will be a litigation and corporate tract, sessions on IP and immigration, and other practice areas. Keynote speakers will highlight our luncheons both Friday and Saturday. Our team is working hard to contract with keynote speakers from both the legal field and the field of inspiration and self-growth. This will be your time to flourish both professionally and personally!

To keep up to date on convention activities, please visit, like, post, and share our Facebook Page: <https://www.facebook.com/groups/396086911068866> or scan the QR code.



WHAT TO DO IN PORTLAND

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.

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>.

WASHINGTON PARK

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 information, check out <https://www.oregonzoo.org/>

If you're looking for a more serene experience in Washington Park, check out Portland Japanese Garden. Proclaimed as one of the most authentic gardens outside Japan, Portland Japanese Garden covers 5.5 acres of beautiful streams and serene pathways, as well as an authentic Japanese tea house. For ticketing information check out <https://www.travelportland.com/attractions/portland-japanese-garden/>

OAKS AMUSEMENT PARK

If it's adventure you seek on your stop-over in Portland, grab a cab 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/>

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 Mt. 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. That picture perfect experience through the pastoral landscape may be just the relaxing ticket you need. Oregon has more than 725 wineries. Offering varieties 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.

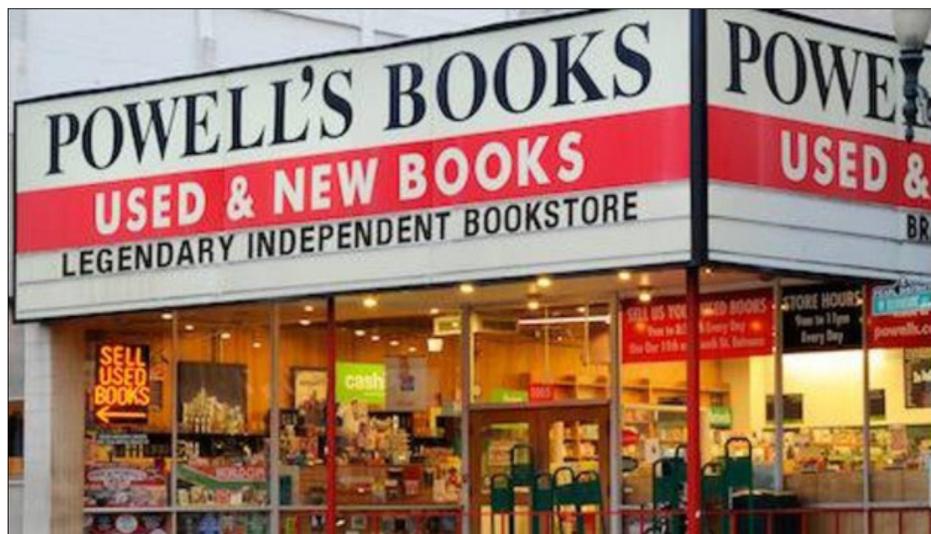
SHOPPING AND FOOD

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 something for every palate and dietary restriction. 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.foodcartsporeland.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.

If retail relief is more your style, check out Portland's indoor urban shopping mall Pioneer Place, in the heart of downtown Portland. Covering four city blocks, Pioneer Place offers that upscale shopping mall experience and delightful bites for that sales-tax free shopping experience.

If malls aren't your thing, Portland has a scattering of delightful independently owned shops stretching across nearly all of downtown. Or, if you're looking for that area the locals love, hop on Portland's street car, or put on your walking shoes and head

west (opposite direction of the Willamette River) up to Portland's NW 21st and 23rd Avenues, commonly known as the Northwest District. The Northwest district is home to vintage shops, delightful bistros, and gourmet delights. While you're there, treat yourself to a delicious homemade waffle cone and unique handmade flavor combinations from Salt & Straw ice creamery.

When the OPA conference committee was dreaming up our logo and theme for this year's conference, it wasn't hard for us to come up with Nurture, Flourish, Participate, and Aspire, with the umbrella of the rose over the city from the view of our famous Portland Rose Garden. Our city and our conference will be a platform for each of you to nurture, flourish, participate, and aspire in your careers and yourselves. Our committee is dedicated to bringing you our best – enlightening and informative education sessions, speakers that get you thinking, chances to get together and swap stories, and great food and entertainment. We look forward to seeing you in October, when the low light of fall will accentuate our lush greens, the colorful leaves, and rainbows following a light rain shower. The rain never stops us Oregonians from doing anything, so don't let it stop you from visiting. Just use a rose as your umbrella.

CATHERINE TEACH



Catherine Teach began her court reporting career in Portland, Oregon, founding her own firm in 1983. In 2014 she merged with another local firm, LNS Court Reporting and Legal Video. Catherine has been active in professional and industry organizations her entire career, including serving as president of the Oregon Court Reporters Association. She is very excited to be on the Oregon Paralegal Association's marketing committee for the 2021 NFPA Convention in Portland. A native Oregonian, in her spare time Catherine loves to dance, hike, bike, and camp in this beautiful state she calls home.

JULIE DOD

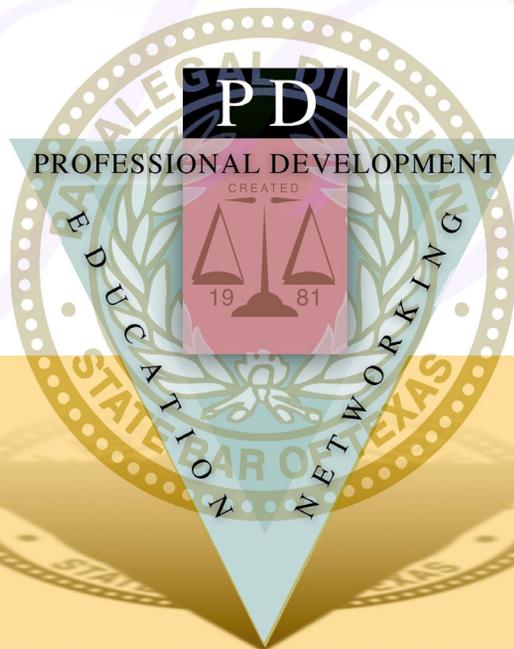


While having worked in the legal field her entire professional career, Julie only began working as a paralegal 7 years ago, and only a year ago completed her Associates in Paralegal Studies. Julie currently works at Jackson Lewis P.C., a national labor and employment firm, and she loves the firm and 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.

TERESA CHRISINGER, RP®



Teresa Chrisinger, RP® is a native of Oregon and has more than 17 years' experience in the legal field. She is currently working in-house as the Senior Paralegal for CLEARResult Consulting Inc., and serves on the Board of Directors for the Oregon Paralegal Association. Teresa also brings her outstanding talents to OPA's committees, including the 2021 NFPA Convention Planning Committee.



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NFPA Futures Task Force: Governance, Strategic Plan and Culture - the Path Forward

By Georgette M. Pecoraro, RP[®], NFPA Futures Task Force Chairman

As I write this it has been almost exactly a year since then NFPA President Nita Serrano, ACP, RP[®], AACCP, FRP, contacted me to ask if I would be willing to serve on a task force intended to develop what has become known as “NFPA 2.0,” the new and improved version of an organization with a long history of serving its membership, and as the leader of the paralegal profession. As a past NFPA President myself, I didn’t hesitate – my answer was an unqualified Yes! Not long after, Nita asked me to serve as chairman of the NFPA Futures Task Force. Again, my answer was an unqualified Yes!

Nita put together an incredible group of individuals to serve on the Task Force, all dedicated to the paralegal profession and with a passion for NFPA. My fellow task force members included Sabrina Henry, Tom Holmes, Robert Hrouda, RP[®], Lisa Lynch, CRP[™], CEDS, Maren Schroeder, RP[®], MnCP, Tom Stevenson, RP[®], Tina Wiles and Tracey Woolsey, RP[®]. Together they reflect NFPA’s membership across the country, and include individuals who served in the past as NFPA board members and/or delegates from 2003 to the present, and who served their local associations as board members and committee chairs over time. This is a diverse group, and every member has NFPA’s best interests at heart.

The group held its first online meeting late in February. It was primarily an introductory meeting to outline the charge

of the task force and to talk about how to get started. And then we all jumped in with both feet! Michael Reed of Bloch Reed Association Advisors was our “sherpa” (his word, not mine) on this journey, assisted by Jaime Nolan. Michael set us all up with access to Microsoft Teams, a platform that allowed us all to chat with each other and share our experiences, thoughts and ideas. We spent the first few weeks familiarizing ourselves the platform, which most of us had not previously used, and getting to know each other. We started to brainstorm about concepts that might better serve NFPA going forward. This was, as one member so perfectly described it, an opportunity to help NFPA look at what it was, what it is, what it can be, and how it can be that and then some, and the why are we (meaning NFPA) here.

We had a lot of work ahead of us, focusing on core values and goals, strategic vision and initiatives, on culture and governance, and perhaps most importantly, on building trust. We knew we needed to seek input and feedback from the members, and we planned to recruit others to participate to help further define concepts as they started to develop.

If you’re following along on the timing, you’ve realized that the Task Force began its work right before the COVID 19 Pandemic turned everyone’s lives upside down! We experienced the same upheaval as everyone else, juggling family and work responsibilities while navigating a new world where the simple act of buying groceries became a new kind of challenge. Against that backdrop, we started the process of researching and reaching out to NFPA members and leaders, so that our efforts would incorporate the best of what NFPA already was with the best of what it could become.

The members of the Task Force took their charge very seriously, and worked diligently to put together historic information, and to develop initial drafts of governing documents and preliminary details for updated values and strategic plans, all while considering the culture that we want to foster. In mid-March, Michael and I made the decisions as to which Task Force members would be on each of the teams responsible for governance, strategic plan,





and culture. As part of those decisions, we determined that in addition to leading the entire Task Force, I would serve as a “float-er” available to all three teams, filling in as needed and assisting with some of the heavy lifting as each team moved forward.

BE BOLD.

We knew that we needed to be bold. We knew that NFPA needed to adapt and change. That included re-imagining leadership, updating governing documents to enable the board and the management company to be nimble, and providing a strategy for moving forward that included clear direction. We knew that NFPA needed an organizational culture that provided good glue to tie governance and strategic planning together, and we needed to refocus that culture. We knew NFPA's culture needed to be rewarding and fun from a personal perspective, and that it needed to be more positive and upbeat to continue to attract engaged and energetic volunteers.

We also knew that the changes the Task Force had been asked to spearhead required participation and commitment at all levels of NFPA, and that the changes we would propose needed to be grounded in data. So we set out to collect that data by engaging NFPA members and leaders through a number of means. We conducted a series of town halls over a number of months to share our process,

gather ideas, garner support, and recruit volunteers. We followed many of those town halls with surveys to help us focus on areas where members and leaders had questions or concerns, and to see where members and leaders were already comfortable with some of the proposed changes.

Bob Hrouda, Maren Schroeder and Tracey Woolsey, the initial members of Team Governance, did an outstanding job of analyzing the existing bylaws, determining the best approach for updating them, and developing initial concepts. They share those concepts at one of the early Task Force town halls, talking through the themes for the proposed changes with those in attendance. Several subsequent town halls also focused on governing documents. Team Governance recruited a number of additional volunteers to constitute its volunteer army.

Over the course of several months, Maren and Tracey assumed the majority of Team Governance's responsibilities. With their volunteer army, with input from board members and others, and factoring in all of the feedback from the town halls and surveys, they updated and finalized a set of Amended and Restated Bylaws. The final Amended and Restated Bylaws were submitted to the delegates in the fall of 2020, and unanimously approved at the NFPA Annual Policy Meeting in October, 2020. Contemporaneously, those

same individuals worked on a complete overhaul of NFPA's Policies and Procedures, continuing that work into winter.

That was no small task, and required many hours of work by numerous detail-oriented paralegals, resulting in a major rewrite of several hundred pages. The Policies and Procedures were submitted to the Board of Directors for approval at the January 2021 board meeting, and approved by the board at that time. With that, after eleven months of hard work, Team Governance had completed its primary Task Force charge. Maren and Tracey have truly become subject matter experts when it comes to NFPA's bylaws and its policies and procedures, and I have no doubt that their knowledge of the documents and the intentions behind the changes made to them will be invaluable to NFPA going forward.

NFPA'S NEW STRATEGIC PLAN

Sabrina Henry, Tom Holmes and Tina Wiles, the members of Team Strategic Plan, were responsible for developing NFPA's new strategic plan. Historically, NFPA's first strategic plan was developed in 2003, with the help of a hired consulting firm. In 2009, the NFPA Board of Directors, facilitated by that same consulting firm, conducted the first significant update of that strategic plan. At the time, I was NFPA President, and the importance of that update was not lost on me. It was

an intense process, and included not just the board, but also the strategic planning coordinator and representatives from each region. We reviewed the assumptions created during the first strategic planning process, then added or deleted assumptions after determining their relevance and their impact on NFPA's future direction. We also affirmed NFPA's core purpose and created core values. And we talked about and affirmed what we envisioned for NFPA's future, assessed our progress toward existing goals and objectives, and reviewed an implementation plan for the future.

Fast forward to 2020, and Team Strategic Plan needed to identify what NFPA's big goals are, and what NFPA's direction should be. They began by reviewing the existing strategic plan, as well as that original 2003 strategic plan. They conducted several town halls focused on strategic planning, talking about what should be different about NFPA in the future, what local association activities would look like in the future, what delegates would consider their biggest challenges in the future, and whether NFPA was creating a fun environment.

VISION AND MISSION

At another town hall they hosted breakout groups to talk about what NFPA's purpose should be, what its vision should be, and what its mission should be. Team Strategic Plan's volunteer recruits came to it in the form of the already-existing strategic planning committee, along with the committee's leader, NFPA's strategic planning coordinator, Becky Kerstetter. The two groups worked together, with support from board members and Team Culture, to identify ideas for strategic drivers, objectives, tactics and key results.

Over the course of a number of meetings after the two groups put together their initial thoughts, Team Strategic Plan, with guidance from new NFPA President Lori Boris, RP®, MnCP, new board advisor Nita Serrano, Becky Kerstetter, Jaime Nolan and me, finalized the new strategic plan. In February, the draft strategic plan was submitted to the NFPA Board of Directors

for review, with an expectation that the board will approve a final draft within one to two months. Once that board approval is accomplished, Team Strategic Plan will have completed its primary Task Force charge, after more than twelve months of hard work. Through the process, Sabrina, Tom Holmes and Tina have become subject matter experts in connection with the new strategic plan, and I would not be surprised to see one, two, or all three of them join NFPA's strategic planning committee to help bring their efforts to fruition.

TEAM CULTURE

Lisa Lynch and Tom Stevenson, the members of Team Culture, brainstormed and researched to identify components of the best culture for NFPA. They conducted several town halls and sent out surveys to solicit input and feedback to aid in their task, working to build trust, and to foster and create a culture that encourages and supports NFPA's members, delegates and board members in expressing themselves, with the mindset of doing the right thing for the best outcomes of our local associations, NFPA, and our profession.

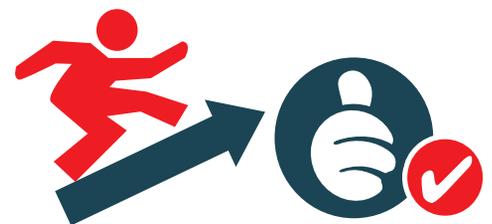
OF ALL THE TASK FORCE TEAMS, TEAM CULTURE'S GOALS ARE PERHAPS THE LEAST "TANGIBLE," BUT IN MANY WAYS THE MOST CRITICAL TO NFPA'S FUTURE.

They focused on a culture that includes being accountable and taking ownership of one's actions, while being respectful and kind as to the feelings and positions of others; and a culture that makes us not just want to listen to others, but to truly hear and be open to what others are saying. Team Culture recruited NFPA members to serve as additional volunteers in their efforts, naming their group of volunteers "Culture Club." Team Culture has made great progress in setting the stage to reach their goals, including creating flags visualizing the components of a great culture. In January of this year, Team Culture

hosted a town hall in a talk show format where three NFPA members with different backgrounds and perspectives talked about their experiences in NFPA and their hopes for its culture in the future.

They continue to work on ideas and initiatives to create and foster a culture in NFPA that includes the behaviors necessary for successful relationships; that emphasizes diversity, equity and inclusion; and that helps to ensure mutual respect and a positive environment. Of all the Task Force teams, Team Culture's goals are perhaps the least "tangible," but in many ways the most critical to NFPA's future. Although Team Culture has accomplished its primary Task Force goal in identifying and beginning to develop and foster the best culture for NFPA, it will be an ongoing process. I believe their work, although not necessarily in the context of the Task Force, will continue going forward.

The members of the Task Force did an amazing job, often working with very specific time constraints. They worked together in teams and in the group as a whole, collaborating with each other while also incorporating thoughts and ideas from NFPA members and leadership. Their passion and dedication shines through in all they have accomplished. I believe that their work will stand the test of time, and that they have created the best framework for NFPA to move forward into the future. I am honored to have led this group, and to have been able to participate at every level of its work.



OPPORTUNITIES

William R. Robie Leadership Award

NFPA presented the William Robie Leadership award to Christine Hansen, ILAP at its Annual Convention on October 24, 2020.

NFPA established this award in 1993 to honor the memory of the late Chief Immigration Judge William R. Robie for his dedication to the expansion of legal services and equal justice for all Americans, and his commitment to the paralegal profession. The winner of the annual award must have made a lasting legacy through contributions to the community and paralegal profession. Larkin Hoffman Attorneys sponsored the 2020 William R. Robie Leadership Award.

Hansen's strength and fortitude in the profession is one that effectively improves the paralegals she interacts with by her emphasis on education, communication and collaboration with other paralegals and members of the legal community.

Hansen has enthusiastically worked on behalf of the paralegal profession and the Illinois Paralegal Association (IPA) for 40 years. She began her paralegal career after earning a Bachelor's degree from the University of Wisconsin-Eau Claire with a degree in History and Political Science. She received her paralegal training from Roosevelt University Lawyer's Assistant Program specializing in litigation. Hansen served on the Roosevelt University Lawyer's Assistant Advisory Board since 1990 and recently retired after nearly 36 years as a Senior Litigation Paralegal with AT&T.

Beyond retirement, Hansen remained involved and committed to IPA and NFPA. She continues to mentor paralegals, advocating the significance of belonging to a paralegal organization while motivating and inspiring the profession's future leaders.

Hansen made major contributions to IPA and legal community by creating and chairing many Committees, including: Chair of the Senior Section (addressing the problems, needs and interests of experienced members of the profession); Chair of the IPA Standards Committee, responsible for IPA's Salary Survey; speaker at various schools; Chair of the Illinois State Bar Association subcommittee on the Utilization of Paralegals; and co-founder of the In-House Paralegal Section and Illinois Paralegal Accreditation Committee. On the national level, Hansen has served as NFPA delegate, has served on the NFPA In-House Committee, NFPA Unauthorized Practice of Law Committee and served on the IPA committee that hosted NFPA's Convention.

Her passion for helping others is evident in the many charitable events Hansen has helped organized including collections for Operation Gratitude for the military; teddy bear collection for the Illinois State Police; and her continued support of military paralegals.

Award sponsored by Larkin Hoffman Attorneys.

**Larkin
Hoffman**



Justice Champion Award

NFPA presented the Justice Champion Award to Maren Schroeder, MBA, RP at NFPA's Annual Convention in October 24, 2020.

Schroeder is a member of the Minnesota Paralegal Association (MPA) where she has served on their Board for seven years. Her earnest desire for inclusivity, diversity, and desire to learn about societal implications and apply those lessons to her work and life.

Through inclusion "outside the box" initiatives, some of Schroeder's work include: authoring articles discussing her bipolar disorder and challenges as a paralegal; served on the Alternative Legal Models Task Force with the Minnesota State Bar Association working with members to address Access to Justice in Minnesota; secured speakers on implicit bias and made presentations on implicit bias for MPA. Maren has also worked with NFPA's Diversity, Inclusion, and Equity Committee on initiatives to incorporate continuing legal education to Minnesota Certified Paralegal program.

With a standing commitment to access to justice, Maren was appointed as the Minnesota Paralegal Association's representative on the Minnesota Supreme Court's Paraprofessional Practice Pilot Program Implementation Committee. Serving alongside attorneys, educators, an Appellate Court Judge, and a Supreme Court Justice, she is worked to establish the framework for advancement of an initiative to allow the limited practice of law by paralegals with attorney supervision in evictions and in certain types of family/domestic matters, with a target on cases with high rates of pro se lit-

igants. This program is expected to provide relief to the thousands of Minnesotans facing court cases without representation.

Schroeder also volunteers with a number of community organizations such as a volunteer crisis advocate for victims of sexual assault; volunteer mediator with Mediation and Conflict Solutions and has served on the Planning & Zoning Commission in her city. Maren's work on medical cannabis and drug policy issues with Sensible Minnesota is also recognized for her efforts medical cannabis reform to access to naloxone, a life-saving opioid overdose reversal agent.

The Justice Champion Award recognizes a practicing paralegal whose conduct, actions and activities demonstrate extraordinary dedication to diversity and inclusion as defined in NFPA's Position Statement on Diversity, Inclusion and Equity.

The Justice Champion Award is given in honor of the late Heather Danielle Heyer, a paralegal who exemplified dedication to the expansion of civil rights, social justice and the expectation that all peoples be treated with dignity and respect. Ms. Heyer was killed while peacefully protesting at a rally in Charlottesville on August 12, 2017.



Justice Champion

Sponsored by Gustafson Gluek, PLLC

**Maren Schroeder, MBA, RP®,
MnCP**

Minnesota Paralegal Association



Paralegal of the Year Award

NFPA presented the Paralegal of the Year award to MaryAnn Ivie, RP® at its Annual Convention on October 24, 2020.

Ivie has been a paralegal for 36 years, currently employed as a Senior Paralegal for Schwabe Williamson Wyatt in their Litigation group. She is recognized by her firm's attorneys as an invaluable trial team member delivering outstanding legal services to the firm's clients. She has played an important role in keeping her firm current in legal industry technology. Ivie has also testified as an expert regarding recovering legal fees for paralegal work performed, outlining the reasonableness of the fees and explaining what a paralegal is and the distinction of tasks performed by paralegals.

In addition to her on the job work, Ivie has actively contributed to the expansion of the paralegal profession. She has served in many leadership positions with the Oregon Paralegal Association (OPA) and NFPA. Ivie has served as OPA Treasurer for many years. She has served as the Publisher of OPA's bi-monthly publication, the *Paragram*. Since 2013, Ivie is also the author of the bi-monthly column *Rules Watch*. Ivie has served on many committees, including OPA's 2021 NFPA Convention Committee, OPA's Annual Convention Committee and Pro Bono Committee. At the national level, Ivie has served as an NFPA delegate representing OPA at its annual meeting and events. She has also served as NFPA's treasurer from 2015 – 2017.

Beyond her commitment to the legal profession, Ivie, for over 15 years, has

been an American Red Cross blood drive volunteer and lifelong blood donor. She has also served as Treasurer at her children's school and co-chaired several silent auction fundraisers for her church. Additionally, she has worked on various charity events for CASA, OPA's fundraiser for the Campaign for Equal Justice and volunteers at Wills for Heroes Clinics.

Throughout her career, Ivie has demonstrated her excellence in trial case management and legal discovery. She has shared her experience through numerous presentations on discovery practice, case management and other areas in civil litigation for various colleges and institutions, including OPA, continuing legal education providers and her firm.

Sponsored by Paradigm Reporting & Captioning, this award recognizes an individual NFPA member whose on-the-job achievements have contributed to expansion of the paralegal profession, including contributions to his or her employer, colleagues and the paralegal profession in general.



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Individual Pro Bono Award

Kimberly Kasper, MnCP is the recipient of NFPA's 2020 NFPA Individual Pro Bono Award. Kasper is a member of the Minnesota Paralegal Association and serves as the St. Cloud Co-Chapter Director. Kim is medical malpractice paralegal at Quinlivan Hughes in St. Cloud.

Kim's Pro Bono work is outstanding. She has shown her relentless commitment to Pro Bono work through her work with Wills for Heroes a program that provides wills and estate planning legal work for first responders, police officers, firefighters, and correctional officers. Kim has volunteered as a data entry volunteer for many years with Wills for Heroes at many different clinics. While estate planning documents were outside her normal area of expertise she learned the document preparation system quickly and does an outstanding job to her prepare wills, powers of attorney, and health care directives

for first responders and their spouses at the clinic events. The clinics require a time commitment of 5-6 hours at the end of a normal workday. She is also the volunteer to train and assist other clinic volunteers.

In addition to her work with Wills for Heroes and fulltime work as a medical malpractice paralegal, Kim makes time to volunteer in her community. She supports the United Way of Central Minnesota and Kids Fighting Hunger. Kim is an excellent example of going above and beyond to help her community.

This award was sponsored by Malson.



Outstanding Local Leader Award

NFPA presented the Outstanding Local Leader award to Amy Conrad at its Annual Convention on

The 2020 recipient, Amy Conrad, is a member of the Minnesota Paralegal Association and has served on their Board for over 10 years. Amy began her involvement in MPA as the Director of Events, where she was the MPA photographer and responsible for the planning of MPA's

spring gala, annual and fall meetings.

Amy has also served in other roles with MPA including President. In that role, she initiated involvement with the local paralegal program and often spoke to students about the paralegal profession.

Amy played an instrumental role with planning the NFPA 2020 NFPA Convention, including placing the bid in 2016.

As a Convention Host Committee Co-Chair, Amy worked with MPA and NFPA on working to adapt to unexpected circumstances related to the pandemic and quickly shifted the convention program from in-person event to virtual sessions, doing a lot of the behind the scenes work.

Conrad is described as having exceptional leadership skills on a local level. Through her local leadership experi-

ence, Amy has become more motivated to be dedicated leader on a national level.

Sponsored by Quinlivan & Hughes, P.A., the Outstanding Local Leader Award recognizes an individual NFPA member for outstanding local leadership contributions to his or her local association.

Outstanding Local Leader
Sponsored by Quinlivan & Hughes, P.A.

Amy Conrad
Minnesota Paralegal Association



NFPA STUDENT SCHOLARSHIP ESSAY

Defining Paralegal

by Mary S. Andriani

On February 17, 2020 the House of Delegates of the American Bar Association (ABA) adopted amendments to Resolution 102B, which provides Guidelines for the Approval of Paralegal Education Programs. In one of these amendments, it was proposed that the term “Legal Assistant” be removed from the definition of Paralegal, an action that imparts higher regard to paralegals and distinguishes them from other less specialized legal support staff. Many paralegal associations across the United States sanctioned the move, which appeared to be a logical next step in the evolution of non-attorney legal support. Consequently, fine-tuning the Paralegal role will further allow for more equitable access to Justice in the United States by continuing the trend of providing affordable legal services.

The ABA witnessed and adapted to variations in the legal profession since its incep-

tion in 1878. By the 1960s social and political changes in the United States, as well as technological advancements, spurred a growth of legal activity. The ABA appointed the Special Committee on Availability of Legal Services in 1968 to implement structures to the legal profession in adequate response to this new demand for legal services. The Committee determined that some legal work could be relegated to non-attorneys, labeled Lay Assistants, rendering legal services more cost-effective. In 1971 the Committee’s name was changed to the Special Committee on Legal Assistants and shortly thereafter the ABA began providing approval for paralegal programs. In 2003 the name was changed to the Special Committee on Paralegals.

Since the introduction of this supportive role, it’s name evolved from Lay Assistant to Legal Assistant, then to Paralegal. The expression Lay Assistant fell by the way-

side, but there remained a blur between the terms Legal Assistant and Paralegal, and at times they were used interchangeably. However, over time a distinction between the two became clear. Paralegals tended to assist attorneys more closely with legal matters, implementing legal strategies according to the their direction and billing clients for time worked. In contrast, Legal Assistants tended to provide administrative support and did not bill for their work.

The comingling of terms was in part due to wording in the definition adapted by the ABA in 1997: “A legal assistant or paralegal is a person qualified by education, training or work experience who is employed or retained by a lawyer, law office, corporation, governmental agency or other entity...” Many local paralegal associations adopted this definition. Responding to a request made by the National Federation of Paralegal Associations (NFPA) in July

2018, the ABA House of Delegates reviewed its definition of the role and, after obtaining feedback from ABA approved programs and paralegal associations, ratified to eliminate reference to the term “Legal Assistant” from its definition in February of this year. This alteration reflects the willingness of the ABA to heed the reasonable requests of its constituents.

Defining the term more precisely provides a decisive victory for the paralegal role, setting it apart from other functions and solidifying its place in the field of law. While the Legal Assistant still exists, it is a role now more closely associated to that of the Legal Secretary. Since their creation in the 1960s, legal support roles continue to evolve. However, while some roles may become obsolete due to advancement in technology, it is my opinion that the Paralegal will stand firm, only becoming more specialized with time.

Paralegals can be trained through work experience to perform their roles and educational programs (many of them not ABA approved) are not always required. Likewise, the certification provided by the National Association of Legal Assistants (NALA) and NFPA are for those professionals seeking advancement, but it is not required of all paralegals. This leaves

a vast grey area in terms of qualifications. The more precise wording in the ABA’s definition of Paralegal may shed light on this disparity and prompt a closer examination of requirements. The Empire State Alliance of Paralegal Associations (ES-APA) is currently working to provide a New York State certification to those who already are certified by NALA or NFPA. Perhaps in the future these certifications will be mandatory for those wishing to enter the paralegal profession. It seems that both establishing credential requirements for paralegals and precisely defining the role continue to be works in progress.

The addition of non-attorney legal staff to the profession has made providing legal services more affordable. The business model in the legal services market that had emerged since the late 19th century was largely based on a pyramid organizational structure in which a partner was serviced by several associate partners who hoped to one day become partners themselves. By the early 1960s this model was no longer sustainable due to factors like the expansion of in-house legal departments of corporations, globalization and technological advances. As they increasingly competed with each other, law firms were forced to reduce costs while providing more value to their clients. The Special

Committee on Availability of Legal Services was appointed by the ABA in 1968 in response to this call for a new model.

The addition of non-attorney supportive roles was a way of providing legal services at more affordable costs. The hierarchy of a typical firm would include partners, followed by associate attorneys, paralegals, legal assistants, secretaries and clerks. This restructuring provides more selection in terms of legal representation and high quality legal services could be more available to people of all economic levels. Even those with few financial resources are more likely to find fair representation and, in turn, have a greater chance of settling their legal matters in a just way.

Every profession evolves in response to outside factors. The passing of amendments to Resolution 102B is an example of an adjustment to new norms in the practice of law. It is a healthy move that has streamlined the paralegal role, further entrenching paralegals as indispensable components in the hierarchy of law firms. As a result, whether intentional or not, Justice has become more accessible throughout our society.

sponsored by Paradigm Reporting & Captioning

NFPA Trivia

Match these NFPA events with the year they happened:

- | | |
|---------------------|--|
| 1981 (40 year ago) | 1. Host associations allowed to designate a local charity for convention |
| 1991 (30 years ago) | 2. Two new member associations announced |
| 2001 (20 years ago) | 3. Reorganization of the Regions |
| 2011 (10 years ago) | 4. Annual meeting in Indianapolis, IN |

Interested in more NFPA trivia? <https://www.paralegals.org/files/History-1974-2014.pdf>

PCGE SCHOLARSHIP SUBMISSION:

The Role of Certifications and Licensure in the Evolution of the Paralegal Profession

By Julianne Di Benedetto

Since the emergence of the paralegal in the 1960s, the paralegal profession has continuously evolved.¹ The earliest paralegals were existing law firm employees who were provided additional training.² Since then, the legal field has adopted different names for legal support staff including “legal assistant,” “legal secretary,” and “paralegal.” Over time, the profession grew and the responsibilities of the paralegal became more complex. This resulted in the necessity of formal education in the form of college degrees and certificate programs. After the formation of national paralegal organizations, certifications emerged. Similarly, some state organizations began to offer their own certifications. These organizations allowed paralegals to demonstrate their developed skills and higher knowledge. Within the last several years, the profession has evolved yet again to implement more advanced certifications and licensures with the purpose of assisting in the access to justice.

The access to justice has been a continuing obstacle in both civil and criminal matters in the United States, and the statistics are staggering. According to the Legal Services Corporation, in 2017, “86% of the civil legal problems reported by low-income Americans received inadequate or no legal help.”³ The report further states that “71% of low-income household experienced at least one civil legal problem

in the last year.”⁴ Professions outside of the legal field have addressed the issue of providing access to low-income households. Accounting firms offer different levels of personnel, and certain staff members are assigned to cases depending on the client’s needs. In the medical field, some nurse practitioners are able to perform many of the same services as physicians. In both instances, these professionals provide similar services to those of their advanced counterparts but at a reduced rate.⁵

Some states have already seen the value of allowing independent paralegals to provide select substantive legal services. Washington established the Limited License Legal Technician (“LLLT”) program where non-lawyers were permitted to offer specific family law services to assist with the access to justice.⁶ Though the Washington Supreme Court has since decided to cease licensing new LLLT candidates, those who have already earned the recognition will be permitted to continue practicing.⁷ Since the emergence of the LLLT program, nine other states have implemented licensing programs for paralegals with additional states reviewing options for increased access to justice.⁸ Further, state paralegal associations have executed their own credentialing programs. In total, six associations offer certifications while one state paralegal organization (located in Illinois) offers an accredited designation.⁹

Further still, national paralegal organizations offer certifications and recognition. These include the National Federation of Paralegal Associations (NFPA); NALA: The Paralegal Association; NALS: The Association for Legal Professionals; the American Alliance of Paralegals, Inc.; and the Association of Legal Administrators.¹⁰

Until recently, the terms “paralegal” and “legal assistant” had been synonymous. In February 2020, the American Bar Association updated the definition of “paralegal” by removing the term “legal assistant” from the description.¹¹ In addition to this revised definition, a state certification or licensing requirement would further differentiate paralegals from other legal professionals, such as legal secretaries and clerks. Some paralegals argue that they provide substantive legal services exceeding those provided by other legal support staff; therefore, they should be credentialed in order to demonstrate their advanced skills and knowledge.¹²

Furthermore, a candidate that is considered a paralegal in one firm may be deemed a legal secretary in another firm. This vagueness leads to a challenge for future employers: How is a prospective employer able to determine the applicant’s worth to the firm? The difference in the levels of skills and knowledge may vary greatly among paralegals.¹³ Additional licensure or certification would define any

ambiguities, as a set standard would be available on which to judge the paralegal.

Existing certification programs (such as those offered by the National Federation of Paralegal Associations) and licensing programs (such as the LLLT in Washington) require continuing legal education. Whether the paralegal is certified by a paralegal organization or licensed through the state, continuing legal education is required. This condition ensures that the paralegal is current on the newest developments in the law. This is similar to the continuing education requirements of lawyers.

The paralegal profession has evolved from performing clerical and administrative duties to preparing substantive legal work. Through education, certifications, and licensing, paralegals are more qualified than ever to perform legal services to clients. Whether the motivation is to provide an increased access to justice, to set standards in the profession, or to demonstrate advanced knowledge and skill, the role of the paralegal will continue to evolve.

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This scholarship was sponsored by sponsored by the Paralegal Education Group.

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The NFPA Career Center offers job seekers the tools they need to quickly find and apply for top paralegal positions.

ABA Recognizes Exceptional Paralegal Students

The American Bar Association is celebrating 45 years of ABA Approval of Paralegal Programs. Program coordinators from various schools around the country submitted profiles of their star students and four Illinois Paralegal Association members and one member from Western New York Paralegal Association was chosen to be featured. Congratulations to all the outstanding paralegals featured.



JULIANNE DIBENEDETTO

*Associate of Applied Science Degree,
Paralegal Studies, 2020, College of DuPage,
Glen Ellyn, IL*

*Associate of Applied Science Degree,
Paralegal Studies, 2020, College of DuPage,
Glen Ellyn, IL*

As a teenager, Julianne Di Benedetto enjoyed debating with teachers and playing “devil’s advocate” with friends.

“I was told by family members and friends that I should go into law,” she said. “But before enrolling in the program at College of DuPage, I didn’t realize that there were career paths in law other than becoming an attorney or judge.”

In fact, when Di Benedetto initially attended COD, her focus was on foreign language. But she took a hiatus from school when she was promoted at her job in retail. She decided to return to school upon realizing she wanted a career change.

“After doing some research, I found the paralegal career, and it sounded perfect! It combined my interest in law with my skill set—writing, organization and attention to detail,” she said. “Soon thereafter I enrolled in my first paralegal class, and I immediately knew that this was the career for me.”

While COD offered a flexible class, Di Benedetto was impressed that the Paralegal Studies program was approved by the American Bar Association.

“For students pursuing a degree or certificate in paralegal studies, enrolling in an ABA-approved program is crucial,” she said. “The ABA has a strict approval process with the purpose of, per their website, ‘develop[ing]... superior paralegal education programs.’ Since the COD Paralegal Studies program is one of these select programs, students can enroll knowing that they will receive a quality education and that they will be prepared to work successfully in the legal field. Employers recognize the importance of this approval, and many require that an applicant’s degree or certificate

come from an ABA-approved program.”

Di Benedetto earned an Associate in Applied Science degree, graduating with High Honors and a perfect 4.0 GPA in her paralegal classes. She later earned her credential as an Illinois-Accredited Paralegal from the Illinois Paralegal Association. “I owe a lot to the Paralegal Studies Program. Sally Fairbank, program chair, and Linda Jenkins, adjunct faculty, both helped me find my first job at a bankruptcy and tax law firm. This was almost five years ago, and I am still at that firm today as a senior paralegal. I love what I do. The work is fulfilling, and I enjoy helping our clients.”

COD is still a part of Di Benedetto’s life, as she returned to pursue two certificates in accounting. She recently became certified in QuickBooks and is currently preparing to sit for the NALA (National Association of Legal Assistants) Knowledge Exam for her Certified Paralegal credential.

Because of her passion for education and learning, Di Benedetto would like to earn a bachelor’s degree, earn the CORE Registered Paralegal credential from the NFPA (National Federation of Paralegal Associations) and eventually teach a paralegal course to help others prepare for certification exams.

Di Benedetto thanks the faculty of COD’s Paralegal Studies program for their unmatched dedication to students. “The experience that I had was life-changing. Through this program, I found an amazing career and made lifelong friends,” she said.

-Submitted by Sally Fairbanks, Program Director, Paralegal Studies Program, College of DuPage



MIRENA FONTANA

Bachelor of Professional Studies and Paralegal Certificate, 2012, Roosevelt University, Chicago, IL

Roosevelt University recognizes Mirena Fontana, a graduate with an inspirational story of her own who now inspires others. Mirena earned her Bachelor of Professional Studies degree and Certificate in Paralegal Studies from Roosevelt in 2012. When she began her studies at Roosevelt, she was in the middle of a personal crossroads, a single mother, raising three young children. She wanted to lead by example of how anyone can reinvent themselves at any time in their life. Full of goals, she was determined to not only get an education and obtain a career in the legal field but to choose a job where she could help those in need. Concurrently with her studies, Mirena interned for both the Kane County 16th Judicial Circuit and Romanucci & Blandin, LLC where she continues her exciting career today.

She now serves as Senior Paralegal at Romanucci & Blandin, LLC, a Chicago-based national civil rights and personal injury practice committed to fighting for victims of negligence, abuse and wrongful death. An integral part of the firm's team, Mirena concentrates her time working on cases involving police misconduct, civil rights actions, medical malpractice, construction,

aviation and motor-vehicle accidents, sexual abuse, wrongful death, sex trafficking, school bullying and hazing, mass torts and class actions, as well as other catastrophic personal injuries. Her primary focus is supporting named partner Antonio M. Romanucci and a team of attorneys who are working on a myriad of cases. Mirena and her team approach each client and case with passion and preparedness. This attitude and determination has assisted the firm in obtaining dozens of verdicts and settlements for its clients that each exceed \$1 million. In total, the firm has earned more than \$500 million for its clients.

Regarding her experiences since completing her degree, Mirena's own words provide inspiration for others. "I am proud to share that I finally feel like a true litigation paralegal. For a long time, I felt like I was trying to get there and prove myself. It has taken experiences to recognize that I bring a lot to the table and hold tremendous value. While it took many years of hard work, dedication and time to get to this point, I now know that I am an important contributor to our attorneys, clients and the end result – securing justice."

Mirena gives back to Roosevelt by serving as a member of the Paralegal Studies Program Advisory Board and as a member of the steering committee of our Alumni Group. She has been a speaker in paralegal classes and at Information Sessions for prospective students. She is a frequent presenter and contributor at Alumni Group events. She has served on the Group's annual Graduate Panel and presented on the topics of professionalism in the workplace, the job interview process and appropriate professional attire. Her generous nature, sincere manner and willingness to share her experiences, put her audiences at ease while providing inspiration to achieve. She tries to remind and encourage students and those peers younger than herself that their job is what they make it and that it will always be evolving. According to Mirena, "If you have the desire, you will learn something new each day and hour in this career. You will never be bored!"

-Submitted by Carrie Lausen, Program Director, Paralegal Studies Program, Roosevelt University



MELISSA JURIK

Associate of Applied Science Degree, Paralegal Studies, 2012

College of Lake County, Grayslake, IL

When Melissa began pursuing her paralegal education in our program, she was nontraditional aged, first generation college student, raising three children, while bartending at night. Her enthusiasm for learning was apparent from the very first day of our Introduction to Paralegal Studies course, and she immediately became involved in our student club, and in short order became its president.

While she completed her ABA approved AAS degree in Paralegal Studies, she helped launch a scholarship for paralegal students, coordinated a book drive resulting in the donation of literally a truckload of paperback books to the library for inmates at our local jail, and became a student ambassador for the college. Melissa tirelessly contributed her time and energy to our larger school community, she was an officer for the Phi Theta Kappa Honor Society and the First Generation College Student Club.

Melissa also won the NFPA's national scholarship award during her last year

in our program. This was an exceptional opportunity as the award included a full sponsorship to attend the NFPA's national conference in Alaska that year. There, she immersed herself in the paralegal association network. After graduating our program in 2012, she began her paralegal career, and then began pursuing the ABA approved BA degree at Roosevelt University in Chicago, currently in progress. Melissa Jurik attended not one - but TWO - ABA approved paralegal education programs!

The Illinois Paralegal Association (IPA) is the current beneficiary of Melissa's professional energy, having joined the IPA board a few years ago. I am proud to say that Melissa is now serving as the president of the Illinois Paralegal Association. Her leadership is impressive as she has helped the IPA pivot their programming into virtual spaces during the pandemic. The Illinois Paralegal Association has not missed a beat, thanks in large part to Melissa's relentless enthusiasm for the paralegal community.

Melissa has consistently been a champion of paralegal education. She has lead the Illinois Paralegal Association's development of a paralegal student scholarship award and regularly returns to College Lake County to motivate and mentor our current students. Melissa has certainly made her mark as a leader in the paralegal profession and is successfully employed as a paralegal in a Chicago based litigation firm.

I will always remember something she said to me while she was my student about the reason she came to College of Lake County and began pursuing a college degree. She said she didn't want her children to think she was satisfied with working in a bar. She wanted to show her children that getting an education is a path toward a meaningful career, and that with some effort, everything is possible.

-Submitted by Gayle Miller, Program Director, Paralegal Program, College of Lake County



RAYNALD REVOLUS

Litigation Practice Certificate in Paralegal Studies, 2017

Loyola University, Chicago, IL

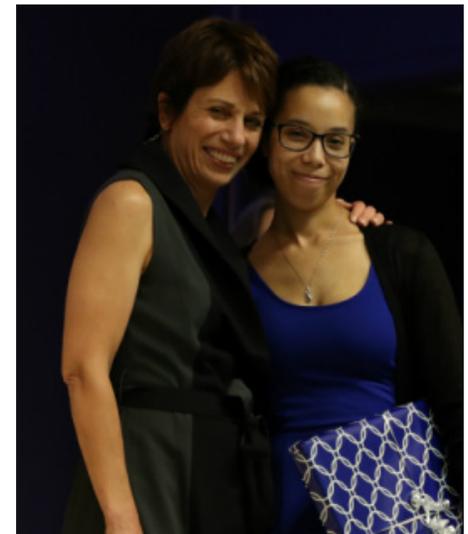
THE WORLD IS HIS OYSTER

Methodical and meticulous, Ray has been investigating the legal profession for years. His bachelor's degree is in Criminal Justice and as a student, he was involved in the Criminal Justice Association and established a Pre-Law Club. He volunteered with CASA, the Domestic Violence Legal Clinic and worked for a general practitioner while pursuing his paralegal certificate. In 2017 he graduated with honors from the Loyola Institute for Paralegal Studies with a Litigation Practice Certificate. Since graduation from Loyola, Ray has been at three firms, moving up to larger and more sophisticated practices each time. It is not unusual to run into Ray at Illinois Paralegal Association events. Not surprisingly, Ray is hoping to attend law school in the next few years.

Ray's goal is to be useful. He enjoys learning and anticipating clients' needs. Ray credits Loyola's Institute for Paralegal Studies with providing him with a foundation of practical legal skills through locally relevant information and interactive and engaging courses. He has worked on an array of cases including, catastrophic mo-

tor vehicle and trucking accidents, medical malpractice, premises liability and product liability. He has summarized and prepared chronologies of medical records, answered discovery, drafted pleadings, engaged in trial preparation, attended depositions, trials, inspections, interviewed witnesses and written many reports and more letters than he can count. He has researched case law, jury verdicts and has updated statutes. His recent work was for a summary judgment motion. Loyola's Institute for Paralegal Studies furthered Ray's legal education and opened doors to allow him to gain relevant legal experience. He now has the information he wanted and the confidence that law school is the right next step. He is currently a Litigation Paralegal at Wilson Elser Moskowitz Edelman & Dicker, LLP.

-Submitted by Marie Harrigan, Program Director, Institute for Paralegal Studies, Loyola University, Chicago



MELANIE VAZQUEZ

Bachelor of Science Degree in Paralegal Studies, 2019

Daemen College, Amherst, NY

Melanie Vazquez graduated in May of 2019 and was awarded the Excellence in Paralegal Studies award for her academic performance and her unflinching support of the Paralegal Studies program and the Paralegal Club. I first met Melanie at a communi-

ty college, where she expressed her passion for the law and her determination to pursue a career in law. Melanie showed remarkable persistence and determination when after graduating from the community college, taking some time off, moving across the country and back, and giving birth to a wonderful son named James, she enrolled in Daemen College Paralegal Studies to earn her B.S. Although her studies were sometimes interrupted by life events, Mel-

anie never gave up. Not only did she earn high grades for her excellent work, but she also gave her enthusiasm to the program by creating special fundraisers like the Halloween Pumpkin Sale which raised the program's profile on campus. The monies raised were donated to a domestic violence program. Melanie earned the respect and affection of the instructors and students, and we are all very proud of her!

-Submitted by Margaret Phillips, Program Director, Paralegal Studies Program, Daemen College

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 Jared Culotta, Houston, Texas
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OREGON PARALEGAL ASSOCIATION



HOW HAS BEING AN NFPA MEMBER BENEFITED YOU PROFESSIONALLY?

Being able to connect with paralegals around the country. I have been able to reach out to colleagues in other states when sending attorneys to out of state depositions or when matters involving other jurisdictions come up.

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

Networking. When I was first starting out as a paralegal, I didn't understand how important networking is for our profession. Now, I have a pool of highly skilled peers in various practice areas that I can call on if I ever have questions.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

OPA is lucky to have great CLEs throughout the year. A lot of our CLEs are presented by experienced paralegals. This gives us a practical insight to how new rules impact can our practice.

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?

I enjoy employment law because two days or cases are ever the same. For example, today I spent the day researching witnesses. Tomorrow, I may interview witnesses, review discovery or client documents. The variety keeps me engaged.

I BECAME A PARALEGAL BECAUSE...

Becoming a paralegal was supposed to be an opportunity to tip my toe into the legal field to see if I wanted to attend law school. I'm still torn if that was the right decision for me. I enjoy my ca-

reer as a paralegal but I can't help but wonder what life would have been like if I ended up as a member of the bar.

WHAT IS YOUR FAVORITE PART ABOUT BEING A PARALEGAL?

There's always an opportunity to learn something new. I have written hundreds of subpoenas in my career. You'd think I could write any subpoenas with my eyes closed. It never fails, however. There is always a unique factor that requires thinking outside of the box or learning a new set of rules for a foreign jurisdiction.

WHAT HAS BEEN YOUR MOST MEMORABLE MOMENT OF YOUR CAREER SO FAR?

Without a doubt, winning a highly contentious trial on directed verdict. There was a lot of highly skilled lawyering from both sides and sleepless nights of sifting through last minute discovery. Everything about the case was difficult but it was all worth it in end knowing the client received the outcome they deserved.

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

Go outside every day. I make it a point to go outside every day. Yes, even in the rain. I live in the Pacific Northwest. If I waited for the rain to stop, I'd never get outside!

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?

Take time to unplug and get away from work to do what you enjoy. I can't wait to be able to travel again. Exploring has always been my way of unwinding.

If out of control stress is a recurring theme or a way of life for your job, it doesn't need to be that way. Evaluate the situation. Maybe there are changes that can be made to the way your team works and communicates that can reduce stress for everyone. The last advice I'd give is that there are other teams and other law firms that may be a better fit. I've made a few moves in my career to finally end up in a lower stress environment.

WHAT IS THE MOST IMPORTANT TREND AFFECTING THE LEGAL FIELD?

AI – Artificial Intelligence. AI is impacting the types of data we need to be aware of in cases. Also, we are seeing it emerge in our practice tools like document review platforms and research

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

I think our biggest impact is access to justice. We all know there is a cost savings to paralegals performing work that may otherwise be done by an attorney. However, we're starting to see limited licensing of paralegals in many areas. This is something that is being explored in Oregon and has the opportunity to help everyday people access justice and navigate their way through our complex legal system.

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

Was he always this loud? Yes.

"IF I WEREN'T A PARALEGAL, I WOULD ... probably still have hair."

Mariana Fradman, MBA

NEW YORK CITY PARALEGAL ASSOCIATION, INC.



HOW HAS BEING AN NFPA MEMBER BENEFITTED YOU PROFESSIONALLY?

Being an NFPA member has benefitted me in many ways. One of the ways was through professional development. An opportunity came about in becoming one of the Ethics and Development Coordinators and since UPL (Unauthorized Practice of Law) is a major concern and great interest of mine, it seemed like a good fit and thanks to NFPA for that opportunity.

Another benefit is networking. Not only do you have people able to answer questions at the click of a mouse or keyboard, but you have a network of paralegals spanning the United States and even in other parts of the world that can be of help! Along with networking, you're building friendships and relationships. This can be more than just a professional association, for some of us, it turns into added family.

The last benefit I'll mention of the many is CLE's. Whether I have attended CLE's or meeting the President's Challenge and helped in creating a CLE (A Day in The Life of a Commercial Real Estate Paralegal) I find this benefit to be excellent. CLE's help keep paralegals in the forefront of the legal community and help our creative side take over as we start to wonder, what else do I need to learn? How can it benefit my attorneys, my colleagues, the legal community, and beyond?

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

A definite benefit is networking. It's great to see volunteers working hard to fos-

ter a thriving legal community. Making friends that span throughout the years is a benefit as well for me. The CLE's as well.

WHAT MEMBERSHIP BENEFIT IS IMPORTANT TO YOU AND WHY?

Membership. Being a part of a professional organization is a benefit in itself. To network, CLE's, being able to volunteer and have colleagues and many throughout the legal community as a resource, colleagues and at times even friends.

WHAT IS A TYPICAL WORK DAY LIKE FOR YOU?

A typical day working from home now consists of reviewing documents, drafting documents, assisting with transactions, and answering questions.

I BECAME A PARALEGAL BECAUSE . . .

As an immigrant, I was looking for what I wanted to do here in the U.S. and I came across a brochure in the administrative office of the college I was intending to attend on paralegal studies. I also figured that I speak more than one language and that there will always be immigrants in this country so I knew I wanted to be of service. I was a former engineer in my country, and I worked with patents and trademarks. I liked my classes and this is how I started to embrace the paralegal profession.

WHAT IS YOUR FAVORITE PART ABOUT BEING A PARALEGAL?

The challenges. It's never boring! What has been your most memorable moment of your career so far?

Friendship. It may seem a bit sugar

coated but developing friends over the years from different walks of life and knowledge has truly been a highlight.

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

Separate home from work.

WHAT ADVICE WOULD YOU GIVE A STRESSED OUT PARALEGAL?

Don't take anything personal. If you can walk away from your computer and take a walk (at least around the block), it will help to clear your mind and it may help you get back to work a bit more refreshed.

WHAT IS THE MOST IMPORTANT TREND AFFECTING THE LEGAL FIELD?

Technology, we need to make sure we're on top of it as it is evolving at a rapid rate.

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

We have a huge impact. I think we are the main force for the delivery of legal services.

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

Diary of an Entry Level Paralegal.

I accumulated so many stories in the beginning of my paralegal career that I used to think, "When I retire I need to write about this." That's where I would start to write about my life.

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

A fashion designer.

2020-2021 President's Challenge*



IS MEETING THE PRESIDENT'S CHALLENGE ON YOUR 2021 TO-DO LIST? HERE IS A REMINDER THAT YOU NEED TO DO ONE OF THE FOLLOWING:

- 1. TWO NEW RPS AND TWO NEW CRPS;**
- 2. MAINTAIN MEMBERSHIP NUMBERS (SPECIAL RECOGNITION TO THOSE WHO ARE ABLE TO INCREASE MEMBERSHIP); AND/OR**
- 3. PREPARE AND PRESENT AT LEAST ONE WEBINAR.**

**to meet the challenge, associations must complete one or more*

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