



# Capital Area Paralegal Association

An Affiliate of NALA – The Paralegal Association

**P.O. Box 773**

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## 2019 REPORT TO THE TEXAS ALLIANCE OF PARALEGAL ASSOCIATIONS

April 13, 2019  
Longview, Texas

Presented by Kristina Kennedy, CAPA President

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# **INTRODUCTION**

## **Kristina Kennedy, CAPA President**

The Capital Area Paralegal Association (CAPA) is the local association for Austin and the surrounding areas. CAPA's expressed mission is "to serve and promote the paralegal profession." Our purposes include providing substantive continuing legal education, shaping guidelines affecting the regulation and development of the paralegal profession, and encouraging high ethical and professional standards. CAPA is an affiliate of NALA-The Paralegal Association, and works closely with District 4 of the Paralegal Division of the State Bar of Texas.

One of CAPA's main goals is to provide substantive continuing legal education to its members. By the end of this term, we will have offered 20 hours or more of quality CLE. CLE is provided at CAPA's monthly membership meetings held on the last Wednesday of every month, except June and December. Attendance ranges from 35 to 80 attendees at our monthly meetings. We have also offered several Lunch & Learn CLE opportunities, at which lunch is provided by one of our Sustaining Members. Our 5th Annual All-Day CLE Spring Seminar, a joint event with District 4 of the Paralegal Division, is scheduled for May 3, 2019. The seminar will be held at the University of Texas Thompson Conference Center (where it has been the last four years), as this venue is conveniently located and offers ample free parking. There will be six hours of individual speaker presentations.

As of 2017, CAPA members must meet a CLE requirement as a condition of membership renewal. A Voting Member must report 5 hours of CLE to renew their membership, and any Associate or Student Member must report 2 hours. Members are allowed to use 1 hour of self-study or pro-bono work, and students are allowed to use 1 hour of volunteering at a CAPA event or a substantive law class they are currently attending. In addition, the Board appoints a CLE Audit Ad Hoc Committee to perform annual audits after the grace period ending March 1 expires.

Our CLA/CP Study Group has been "under construction" for the last few years, and now it is up and running with two recently certified CPs. The study group will meet one time per week in the months leading up to the exam.

CAPA's Networking and Social Events Committee has been very busy this year planning and executing some really fun events. In August, we had a "Meet Your New Board" social at The Capital Grille. This event was a success, and we were fortunate to have one of our Sustaining Members sponsor appetizers and drink tickets. We celebrated Texas Paralegal Day with District 4 of the Paralegal Division at The Grove Wine Bar & Kitchen on October 23. CAPA's Paralegal of the Year was announced at our October luncheon, and the recipient was presented with a plaque and a \$500 cash prize. This year's Paralegal of the Year was Francesca Romans, who chairs several committees and has previously served on the Board. Our holiday celebration was held on December 10 with a festive party at The Four Seasons Hotel with music, appetizers, desserts, and lots of door prizes. This celebration was well attended and a lot of fun. Each attendee received a drink ticket on their way in, and a guitar soloist provided music throughout the evening. We had a large number of Sustaining Members attend, and all provided door prizes (with some bringing more than one!). CAPA's Third Annual Committee Chair Appreciation Event is pictured below, and the chairs were treated to a night of pizza and fun at Painting with a Twist. There were sponsors, who provided donations to pay for the venue, pizza, and drinks. Each chair received a gift, and, of course, their painting to take home with them.

CAPA's Mentor Program brings mentors and protégés together. The Committee Chair has been working diligently over the few terms to expand the program.

Over the last few years, CAPA has been increasing its efforts to be involved with paralegal schools and students and we've been successful so far. Various CAPA board members and chairs have visited with classes at Texas State University-San Marcos, the Continuing Education Department at the University of Texas, and Austin Community College.

Two years ago, CAPA created a new committee dedicated to bridging the gap between the Student Membership and local area paralegal schools and CAPA. The School and Student Liaison committee speaks at local area paralegal schools, acts as a direct resource and contact for the Student Membership, and works to build membership from area students.

We had our first UT Group Membership application process, where all members of the paralegal program are automatically member of CAPA. The fee is part of the students' tuition. It was a little rocky at first, but we have figured out how to make this a streamlined process going forward. We welcomed 19 new student members from UT this term.

CAPA is also very fortunate to be working more with the Austin Bar Association. The Austin Bar Association voted to add a non-voting paralegal division to its association this year. One of the CAPA board members attends the Austin Bar Association board meetings monthly.

Our pro bono committee has been outstanding this year, with several service projects. Our members were asked to volunteer at a pro bono clinic that provides basic estate planning documents for cancer patients. Members have also assisted clients at UT Law School clinic with executing wills and transfer on death deeds. We participate with Austin Young Lawyers Association providing pro bono services at Community First! Village, "a 27-acre master planned community that provides affordable, permanent housing and a supportive community for the disabled, chronically homeless in Central Texas." Volunteers also spend time at the Travis County Law Library and Self Help Center clinics, which are Monday through Friday from 10:00 a.m. until noon. Paralegal volunteers assist pro se litigant with the organization of and preparation of uncontested family law documents. We continue to be active with Volunteer Legal Services, Court Appointed Special Advocates, and Austin Bar Association Veteran's Clinics. Our pro bono committee chair has a seat on the Austin Bar Pro Bono Committee, where we stay informed of new projects for membership.

Team CAPA has participated in Keep Austin Beautiful for several years. CAPA adopted a portion of South Congress ("SoCo") street, and we are responsible for cleaning it several times a year. We have a clean-up day scheduled for April 13, in conjunction with the City of Austin's "Keep Austin Beautiful" 30th Annual Clean Sweep. There will be a party for volunteers afterwards.

In an effort to keep the most up-to-date CAPA procedures, spreadsheets and forms readily available to our Board and Chairs, we continue to utilize Dropbox as a repository for all of our Association documentation. Several CAPA folders have been set up and "shared" with CAPA volunteers. As long as all users download and install the Dropbox software on their individual computers, they are all able to collaborate and update documents so that the latest version is available to all of the users that share access to the folder(s) at any given time.

We have continued to promote CAPA this year in various ways within the membership, at paralegal schools, and throughout the legal community. We continue to "spotlight" a committee, and a board member is scheduled each month to greet members as they arrive at the monthly CLE luncheon. We recognize new members and attendees by greeting them warmly and making them feel comfortable. We have also consistently posted on social media.

We continue to use PayPal for online payment of any event that requires it. This has proven to be very convenient and a huge success with our membership! We have also expanded our PayPal capabilities to allow members to make donations to CAPA's chosen charities online.

CAPA initiated an official budget several years ago, and we have a cross-referencing function to our spreadsheet, allowing us to view itemized expenditures. The budget is updated on an ongoing basis by the Treasurer and is accessible in a CAPA Dropbox folder for any Board member to review at any time. While our finances are down from previous years, our "state of finances" remains solid, and we should come in under budget again this term.

The CAPA Policies and Procedures Manual (our "Rules") is CAPA's main resource for new volunteers and provides a comprehensive description and basic understanding of what is expected of them when they assume a new Board or Chair position. A "read-only" version is provided in a CAPA Dropbox folder. We solicit corrections and updates to the Manual throughout the year, and the Rules and Bylaws Committee updates the Manual.

CAPA offers a Paralegal of the Year Award in October, as well as a Pro Bono Services Award, a President's Award, a Mentor of the Year Award, and a Volunteer of the Year Award, which are all presented at our June meeting.

We started the 2018-19 term with a Saturday Incoming/Outgoing Board Meeting, and have held most of our monthly Board meetings on the second Thursday of each month at noon via teleconference. We have had two other in-person Saturday board meetings, with the option to participate by teleconference. We have also entertained and passed a handful of motions via electronic vote (email).

In summary, we have had a busy, productive, and FUN year. We have continued advancing our public relations, all while providing a steady stream of great CLE programs for our membership, maintaining a balanced budget, educating leaders in place for next year, maintaining relationships with various colleges in order to bring paralegal students into the fold during their studies, and participating in numerous community affairs. We continue to uphold CAPA's commitment to continuing education, and increased our outreach to members to encourage more involvement and volunteering. CAPA hopes to continue to build on these goals and successes each year.



## **BOARD OF DIRECTORS**

### **DIRECTOR / PRESIDENT / ETHICS OFFICER / TAPA LIAISON**

#### **Kristina Kennedy, ACP, TBLS-BCP**

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### **DIRECTOR / PRESIDENT-ELECT / NALA LIAISON**

#### **Brittany Posadas, MBA, TBLS-BCP**

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### **DIRECTOR / SECRETARY**

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### **DIRECTOR / TREASURER**

#### **Brenda Colvin, TBLS-BCP**

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**DIRECTOR / PARLIAMENTARIAN / HISTORIAN****Ruth Konderla**

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**DIRECTOR / IMMEDIATE PAST-PRESIDENT****Carli Collins**

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# **COMMITTEE CHAIRS**

## **STANDING COMMITTEES**

Continuing Legal Education-Seminars .....	Ad Hoc Committee
Continuing Legal Education-Lunch & Learns .....	Alice Lineberry, PLS, CP
Community Services.....	Melissa Tucker, TBLS-BCP
CP/CLA Study Group .....	Jennifer Lovejoy, CP and William Cox, CP
Job Bank .....	Amanda Garcia
Membership.....	Francesca Romans, ACP, TBLS-BCP
Membership Renewal Spot Audit .....	Ad Hoc Committee
Networking & Social Events .....	Tove Sebring and Jennifer Chambless
Pro Bono.....	Amber Haney and Stephanie Seuser
Programs-Door Prizes .....	Sherry Stowers
Programs-RSVP .....	Kara O'Shaughnessy
Programs-Speakers .....	Ariane Walton
Public Relations.....	Francesca Romans, ACP, TBLS-BCP
Publications.....	Carli Collins, TBLS-BCP
Scholarship.....	Vacant
School & Student Liaison .....	Brittany Posadas, TBLS-BCP
Sustaining Member Liaison.....	Debbie Hartzler and Ruth Konderla
Web Team .....	Pamela Etie, ACP Jennifer Rogers, CP

## **APPOINTED COMMITTEES**

Elections .....	Ruth Konderla
Mentor/Internship Programs.....	Brittany Posadas, TBLS-BCP
Rules & Bylaws .....	Francesca Romans, ACP, TBLS-BCP and Pamela Etie, ACP
Mentor of the Year Award .....	Brittany Posadas, TBLS-BCP
Paralegal of the Year Award .....	Francesca Romans, ACP, TBLS-BCP
President's Award .....	Kristina Kennedy, ACP, TBLS-BCP
Pro Bono Service Award.....	Amber Haney
Volunteer of the Year Award .....	Board of Directors

## **LEGAL ADVISORS**

General.....	Michele Mobley, Dubois Bryant & Campbell
Website Terms of Use.....	William D. Wiese, Dubois Bryant & Campbell

## **PRESIDENT-ELECT**

### **Brittany Posadas, MBA, TBLS-BCP, President-Elect / NALA Liaison**

The President-Elect of CAPA attends the monthly board meetings and fills in for the President in the President's absence. Additionally, the President-Elect serves as National Association of Legal Assistants, Inc. (NALA) Liaison and is a member of NALA. The NALA Liaison (i) submits the affiliate reports twice a year to NALA, which include all association events, and (ii) receives and forwards NALA News to the Publications Chair for submission to CAPA's monthly e-newsletter, *The Brief*, and to the Web Team for CAPA's website.

## **SECRETARY**

### **Sherry Stowers, Secretary**

The Secretary attends regular monthly Board meetings and others as required and prepares/distributes minutes of those meetings. The Secretary provides copies of the minutes to the Web Team for publication on the CAPA website. The Secretary also handles correspondence for the Board and others as directed by the President and/or Board.

## **TREASURER**

### **Brenda Colvin, TBLS-BCP, Treasurer**

The Treasurer is an active member of the CAPA Board and responsible for attending Board and monthly membership meetings. The Treasurer is responsible for the Association's accounts receivable, accounts payable, and budget. This includes, but is not limited to maintaining the Association's budget; bank account and other financial records; collection of membership dues and fees for other Association functions; submitting annual tax returns and sales tax reports; and creating Board reports for review.

At the end of each month, three reports which reflect the reconciliation of CAPA's accounts with the Association's bank statements are prepared. A Cash Flow Summary and two Profit and Loss Statements (standard and detailed) are presented to the CAPA Board for approval at every meeting. Additionally, a "State of the Finances" report is prepared for CAPA's annual meeting in June of each year.

CAPA has been using Intuit's QuickBooks for our accounting needs for several years. This year, CAPA has converted from the desktop program to the online content. The transition has been smooth with little-to-no hiccups. The conversion from the desktop program to online makes it easy for other Board members to access the records and does not rely upon the necessity of having access to the Treasurer's laptop.

CAPA also changed banking institutions in an effort to better insure the integrity of funds. It has been a learning experience for the newly elected Board but one well worth the effort. JP Morgan Chase offers not only the online banking experience, but also has a mobile app and links to the online QuickBooks program which makes the Treasurer's monthly tasks just that more efficient and less time consuming.

## **PARLIAMENTARIAN/HISTORIAN**

### **Ruth Konderla, Parliamentarian/Historian**

As Parliamentarian and a member of the Board, she is responsible for attending Board Meetings to assist the President and other officers in following parliamentary procedure and act as the reference person on questions relating to the Association's charter documents and Bylaws.

The Board is currently in the process of soliciting nominations for the 2019-2020 slate of officers. The Parliamentarian will preside over the election of the 2019-2020 officers at our general membership meeting to be held on May 30, 2018, and will conduct the installation of those newly-elected officers at our June 26, 2019 membership meeting.

As Historian, she is responsible for collecting and maintaining financial records for the preceding seven years, all past issues of The Brief, all minutes of the meetings of the Board, and any other items of historical interest to the Association.

## **CONTINUING LEGAL EDUCATION ("CLE")**

### **Alice Lineberry, CP, PLS – Lunch & Learn Seminars**

The purpose of the Lunch & Learn CLE Luncheon committee is to provide additional opportunities to members of CAPA to obtain CLE credits by securing advanced-level speakers to provide one-hour presentations throughout the year or, at a minimum, on a quarterly basis. We have been providing Lunch & Learn/Brown Bag CLE Luncheons jointly with the Paralegal Division, and they have been very well attended. The name was changed last year from Brown Bag to Lunch & Learn since most of our sustaining members provide lunch for attendees.

The Lunch & Learn CLE Luncheons that have been presented are listed below:

**May 10, 2018**

Sponsored by CAPA Sustaining Member Registered Agent Solutions Inc., "Non-profit Organizations" presented by Brian Johnson.

**June 11, 2018**

Sponsored by CAPA Sustaining Member Kim Tindall & Associates, "Court Reporting 101" presented by Kim Tindall.

**September 13, 2018**

Sponsored by CAPA Sustaining Veritext Legal Solutions, "Data Security" presented by Andy Fredericks.

**October 11, 2018**

Sponsored by CAPA Sustaining Member B2 Management & Consulting, "Top Traits to Make You Indispensable" presented by Brenda Barnes.

**November 12, 2018**

Sponsored by CAPA Sustaining Member Capitol Digital & Calforensics, "Cellphone Forensics" presented by Fred Behning.

**December 10, 2018**

Sponsored by CAPA Sustaining Member Level 2 Legal Solutions, "The Power of Project Management: Navigating eDiscovery in the New Year" presented by Daniel Bonner.

**March 7, 2018**

Sponsored by Inventus, "Overview of the Technology for Collection & Review of e-Discovery" presented by Ed Fiducia.

### **Ad Hoc Committee, CLE Seminars**

This committee is tasked with putting together an annual CLE Seminar (either half-day or full day) in the Spring. This includes booking speakers, confirming sponsors, and finding a venue, among many other things. The Fourth Annual Joint CLE Seminar with District 4 of the Paralegal Division, titled "A Medley to Have Your Ready: Something for Every Paralegal" is scheduled for April 27, 2018.

## **COMMUNITY SERVICES**

### **Melissa Tucker, TBLS-BCP, Chair**

CAPA continues its monthly Flower Fund collections and this year will donate the funds to the Dog Alliance. At the end of the year, CAPA will match contributions that are collected from the flower pots provided at our monthly luncheons, up to \$250.00. CAPA also collects soda can tabs for the Ronald McDonald House to aid them in raising funds to support their families. CAPA continues collecting Box Tops for Education to aid those schools without strong PTA support. Additionally, CAPA donates books to the Inside Books Project for inmates.

CAPA has continually kept up with the city's Keep Austin Beautiful campaign. CAPA has adopted a portion of South Congress, known as the SoCo District through the Adopt-a-Street program. The Adopt-a-Street program gives CAPA the opportunity to help the local community environment by collecting litter and beautifying streets in the neighborhood. This citywide program takes the "Don't Mess with Texas" Adopt-A-Highway program to a local level to connect citizens of all ages. CAPA has held quarterly cleanups throughout the past year. CAPA will hold its third cleanup of the year on April 13 in conjunction with Austin's annual citywide cleanup, the Keep Austin Beautiful Clean Sweep. Clean Sweep is part of the Great American Cleanup™, the nation's largest annual community improvement program which rallies people to make sweeping, dramatic changes from coast-to-coast.



## **JOB BANK**

### **Amanda Garcia, Chair**

The CAPA Job Bank is an exclusive benefit for CAPA Members to assist them in locating paralegal and legal assistant opportunities. There is no charge to the employer or the CAPA member for this job listing service. The Job Bank Committee maintains a listing of open positions of CAPA's website, receives placement requests from legal employers in the area, and posts them on the CAPA Job Bank. The focus is to provide prospective employers with qualified candidates through CAPA. In addition, companies posting jobs are made aware of CAPA's Internship Program. For those companies seeking paralegals, the Job Bank Committee provides information regarding market compensation in line with paralegals experience level and a guide to the difference between a paralegal certificate and a certified paralegal for employers to reference.

### **Job Postings by Month**

#### **March 2018**

Law Firm – 5  
Corporation – 0  
Government/Agency – 3  
Sustaining Member – 0

#### **April 2018**

#### **July 2018**

Law Firm – 8  
Corporation – 0  
Government/Agency – 2  
Sustaining Member – 1

#### **August 2018**

#### **November 2018**

Law Firm – 4  
Corporation – 1  
Government/Agency – 1  
Sustaining Member – 0

#### **December 2018**

Law Firm – 5  
Corporation – 1  
Government/Agency – 1  
Sustaining Member – 2

**May 2018**

Law Firm – 9  
Corporation – 3  
Government/Agency – 0  
Sustaining Member – 1

**June 2018**

Law Firm – 4  
Corporation – 4  
Government/Agency – 0  
Sustaining Member – 2

Law Firm – 10  
Corporation – 1  
Government/Agency – 3  
Sustaining Member – 0

**September 2018**

Law Firm – 9  
Corporation – 0  
Government/Agency – 3  
Sustaining Member – 1

**October 2018**

Law Firm – 14  
Corporation – 2  
Government/Agency – 0  
Sustaining Member – 0

Law Firm – 2  
Corporation – 0  
Government/Agency – 0  
Sustaining Member – 0

**January 2019**

Law Firm – 6  
Corporation – 2  
Government/Agency – 3  
Sustaining Member – 3

**February 2019**

Law Firm – 8  
Corporation – 0  
Government/Agency – 2  
Sustaining Member – 2

## **MEMBERSHIP**

**Francesca Romans, ACP, TBLS-BCP, Chair**

The Membership Committee is responsible for processing new member applications, annual renewals, and answering questions about membership in general.

New members may submit applications by mail or online through CAPA's website. The process includes completing an application, paying the membership dues and initiation fee, and submitting all required documentation for verification purposes. Applications are not approved until all payments and documentation have been received by the membership chair. Most new members submit membership applications online, but some still mail in the application, in which case the information is manually entered and a password is emailed to the applicant for access to the website. In an effort to streamline the application process, a deadline of seven (7) days has been added for applicants to complete all requirements. If the deadline is not met, any submitted payment will be refunded, and the application will be suspended and archived.

Renewals are due on January 1st every year, with a grace period deadline of March 1st before member records are archived for the members that have not renewed. Renewals are done either by paying online and emailing the verification forms, or by mailing all documents and check for dues to the membership chair. If a member misses the grace period deadline, his/her membership lapses and he/she must re-apply as a new member. Lapsed member profiles are automatically suspended by the software into an archived status. When that happens, members stop receiving all e-mails from the association, including CAPA's newsletter and information regarding upcoming meetings.

This year, CAPA was fortunate to enter into a new agreement with the University of Texas at Austin Center for Professional Education's Paralegal Program. Each student's admission to the UT Paralegal Program will now include a Student Membership to CAPA. The students turn in their completed applications to the Program Director, who sends them to CAPA's Membership Chair. UT is then invoiced for all of the memberships at one time. CAPA gained 18 students members during the first round in February and March, and we look forward to more as each cycle begins the program.

Our membership levels are as follows:

1. Voting Membership: Applicant must (i) be currently employed as a paralegal, legal assistant or working at least 30 hours per week as a freelance paralegal/legal assistant and (ii) meet ONE of the following criteria:

- (1) received a four-year degree;
- (2) completed a paralegal program;
- (3) have five (5) years of paralegal experience; or
- (4) have received NALA, NFPA, or TBLS certification.

2. Associate Membership: Applicant (i) must be employed as a paralegal but has not yet satisfied (1-4) of Voting Membership; (ii) is presently employed as a coordinator of the paralegal program in a law firm, government agency, or corporate legal department; (iii) is not currently employed as a paralegal, but has completed a paralegal training program, (iv) has previously been employed as a paralegal but is not employed at the time of application; (v) or does not reside or work in the Austin metropolitan area.

3. Emeritus/Lifetime Membership: This is a new membership level for CAPA. Applicant (i) must be a former active voting member of the Association; (ii) must have served either as an officer/director, or as a Committee Chair of the Association; (iii) must be retired from the profession; (iv) is not currently employed as a paralegal; (v) is in good standing with the Association; and (vi) shall not have the right to vote, hold any office, or serve as officer/director.

4. Student Membership: Applicant must be currently enrolled in a paralegal/legal assistant program and provide proof of enrollment.

5. Sustaining Membership: Vendors and legal service providers.

Our online database, Wild Apricot, allows us to view totals for each of our membership levels, view the status of pending applications, and find out who is delinquent in renewing or paying for events.

Current Membership (as of March 18, 2019)

Voting Members	135
Associate Members	48
Emeritus Members	2
Student Members	42
Sustaining Members	*34
	295

Membership one year ago

Voting Members	110
Associate Members	38
Emeritus Members	2
Student Members	21
Sustaining Members	*28
	199

\*Number of companies (not individuals)

We expect our membership to continue to grow. CAPA has a great reputation, and continues to improve because of the time and effort that its members put into it.

## **MEMBERSHIP RENEWAL SPOT AUDIT**

The Membership Renewal Spot Audit Ad Hoc Committee is appointed by the Board and consists of a non-Board member to chair the committee. The purpose of the committee will be to randomly audit a sample of CAPA membership renewal applications and CLE verification forms annually between March-May of each year following the membership renewal period to insure compliance with the membership CLE requirements.

The Spot Audit Committee Chair will select a random number and sort the CAPA membership list to select members to be audited until 10% of the membership has been selected for audit. The Committee Chair will then send an approved letter via electronic transmission to the randomly-selected members, requesting that those members submit their CLE verification form along with proof of attendance to their listed CLEs. In the letter, the Committee Chair will explain the requirements and establish a deadline for the randomly-selected members to submit their CLE attendance proof. For members who miss the specified deadline, one reminder email will be sent giving a final deadline to comply.

Each member must to maintain their own CLE records, including keeping copies of all CLE proof of attendance certificates and completed CLE verification forms in order to comply efficiently should the member be audited. CAPA will not maintain these records for any member and CAPA will not keep a record of a member's attendance at any CLE events. It is each member's sole responsibility to pick up or obtain any CLE certificates of attendance for those CLE events the member attends. For informational purposes only, a list of CLE offered by CAPA is posted on the CAPA website.

The names of individuals who are non-compliant with their CLE requirements or who are non-responsive to the Spot-Audit will be referred to the Board for further action, which may result in suspension of any voting privileges and/or revocation of membership. After review by the Board, and if the membership is revoked and/or voting privileges suspended, the President shall forward a letter to the individual notifying them of their immediate suspension and/or removal from the association.

## **MENTOR/INTERNSHIP**

**Brittany Posadas, TBLS-BCP, Co-Chair and Amber Haney, Co-Chair**

CAPA's Mentor Program is charged with contributing to the development of new paralegals, including providing support, guidance, and direction to new paralegals that will strengthen their links to the paralegal community and contribute to their success as paralegals.

CAPA's Mentor Program envisions a legal community in which every paralegal encounters a nurturing one-on-one relationship and legal community support which, in turn, allowing each paralegal student or new paralegal to develop into their full potential, capable, and making informed, responsible decisions as involved members of the legal community.

CAPA's Mentor co-chairs created new mentor and mentee sign up forms. They held prize drawings (sponsored by a law firm) for mentors and mentees to encourage them to participate. They also hosted



a happy hour for mentors and mentees to meet and get to know each other. Currently, CAPA has 15 dedicated Mentors in various areas of law such as litigation, education, criminal, medical malpractice, and family law with 22 protégés needing mentors to encourage them toward their goals. The CAPA Mentor Program needs more experienced paralegals to become mentors. With the recent addition of UT student mass membership there will be many more mentees requesting a mentor in the upcoming month.

The CAPA Internship Program helps match paralegal student members with an internship position through their membership. When a student member is interested in locating an internship position, the chair sends the CAPA membership an email blast to see if their law firm or office may be interested in having an intern. The co-chairs also reach out to various law firms in Austin to inform them of the program and discuss the firm's interest and ability to host paralegal interns.

The co-chairs maintain a database with law firms available to host interns and student members looking for internships. The committee will continue to reach out to potential intern hosting law firms and governmental entities to expand the list for student members in the fall semester.

## **NETWORKING & SOCIAL EVENTS**

### **Tove Sebring and Jennifer Chambless, Co-Chairs**

The Networking and Social Events Committee is responsible for scouting and securing venues for CAPA's social events.

#### **Meet the Board Happy Hour:**

CAPA hosted its annual "Meet the Board Happy Hour" on August 23, 2018. The event was held at The Capital Grille, and we had a good turnout of about 25-30 attendees. Everyone enjoyed great appetizers and cocktails while meeting, and getting to know the new board.

#### **Paralegal Day Celebration:**

Paralegal Day was hosted Paralegal Division of the State this year on October 23, 2018. The event was done a little different this year to be able to include outlying county associations, and was hosted at The Grove Wine Bar & Kitchen in Cedar Park, TX. The Paralegal of the Year Award was presented to Francesca Romans at CAPA's monthly luncheon on October 31, 2018.

#### **Holiday Celebration:**

Our Holiday Celebration was held at The Four Season's Hotel on December 10, 2018 and was a huge success, with 100+ attendees. Delicious appetizers and desserts were provided, along with wine and beer. We also enjoyed live music from Juan Diaz. Our Sustaining Members provided fantastic door prizes, and the celebration was great fun. All who attended really enjoyed themselves, and once again the feedback was very positive.





## **PRO BONO**

### **Amber Haney, Co-Chair and Stephanie Seuser, Chair**

The Pro Bono Committee informs the Board and membership of opportunities for pro bono service in the Central Texas area. The Committee Chair is a liaison between CAPA and various pro bono projects sponsored by various organizations. CAPA members have contributed over 200 hours of pro bono service in 2019 so far and contributed over 150 hours of pro bono service in 2018. The Committee Chair is a member of the Austin Bar Association Pro Bono Committee and sits on the Board of Directors of Volunteer Legal Services of Central Texas (VLS) to learn about more pro bono opportunities and recruit paralegals for them.

The main projects CAPA is currently participating in:

- CANLAW Clinic (quarterly)
- AYLA Communities First! Clinic (quarterly)
- Travis County Law Library Pro Se Litigant Walk In Review and Self Help Center (Mon-Fri)
- Austin Bar Association Veteran's Clinic (once a month)
- VLS Intake Clinics (once a week)
- RAICES – trips to Karne's Detention Center (once a month)
- CASA of Travis County (ongoing services as a guardian ad litem)
- Austin Citizenship Clinic (quarterly)
- VLS applicant screenings (weekly)

The CAPA Pro Bono Committee is always looking for new pro bono opportunities to provide to membership. CAPA has a tremendous amount of interest and participation in pro bono services.



## **PROGRAMS**

The Programs Committee is responsible for securing advanced-level speakers to provide a one-hour CLE presentation at CAPA's monthly membership luncheons held on the last Wednesday of each month, except June and December. These presentations qualify for one hour of NALA and/or TBLS CLE credits. CAPA members can earn ten hours of CLE each year just by attending the monthly luncheon meetings. The June luncheon is CAPA's annual membership meeting in which new officers are elected and we host our Annual Sustaining Member Expo (previously "Vendor Parade") to provide all participating Sustaining Members an opportunity to make a presentation to the group. In lieu of a monthly luncheon in December, CAPA hosts a Christmas Party for all members.

CAPA sponsors \$25 in door prizes at the monthly CLE luncheons, and our Sustaining Members provide door prizes as well.

CAPA renewed its contract for another year with Chez Zee Restaurant for our monthly general membership meetings. The staff has been very accommodating to our needs, and the food is great.

### **Ariane Walton, Programs-Speakers Chair**

The Programs Schedule for the 2018-2019 year to date is below. All programs are TBLS & NALA approved for 1.0 hour of CLE unless otherwise noted.

July 25, 2018	"Criminal Law & Law Enforcement," presented by Johnny Sutton of The Ashcroft Law Firm (NALA & TBLS approved)
August 29, 2018	"Domestic Violence" presented by Daryl Weinman of Weinman & Associates (NALA & TBLS approved)
September 26, 2018	"Special Education Law: What You Need to Know About the IDEA & IEPs" presented by Elizabeth Angelone of The Cuddy Law Firm (NALA & TBLS approved)
October 31, 2018	"Ten Most Terrible Scary Monster Mistakes the Savvy Paralegal Can Easily Avoid" presented by Laura Fowler of The Fowler Law Firm (NALA approved)
November 28, 2018	"ProSe Litigants and Uncontested Family Law" presented by Amber Haney of The Haney Law Firm (NALA & TBLS approved)
January 30, 2019	"Artificial Intelligence and the Ethical Practice of Law" presented by David Chamberlain of Chamberlain McHaney (NALA & TBLS approved)
February 27, 2019	"The Weird & Wonderful World of Workers' Compensation" by Bob Graves of Burns Anderson Jury & Benner (NALA & TBLS approved)
March 27, 2019	"CryptoCurrency 101" presented by Neal Fletcher of Creative Combat (NALA approved & TBLS pending)
April 24, 2019	"Travis County District Clerk Office Point of View" presented by Velva Price, Travis County Clerk (NALA & TBLS approval pending)

These presentations were or will be posted on CAPA's website calendar, the Paralegal Division's CLE calendar, and on all of CAPA's social media pages. The RSVP subcommittee distributes, collects and



reviews surveys at each luncheon to gain feedback on speakers and also to offer members the opportunity to make recommendations for future speakers and/or subject matter.



### **Kara O'Shaughnessy, Programs-RSVP Chair**

The RSVP Subcommittee has been successful in promptly checking in attendees at each luncheon over the past year. Our normal attendance has been in the range of 40 to 55 attendees each month, with an average of 45 attendees, depending on the topic of the luncheon. The lists of attendees are split between (1) payment by personal check, (2) payment by firm check, (3) Sustaining Members/paid in advance, and (4) payment in cash. CAPA is able to accept payment for the luncheons through PayPal. The use of Wild Apricot to manage attendees has proven to be very successful. We can export attendee lists into Excel and manipulate them to create check-in lists for each of the pay categories listed above. The exported list is also used to create name tags for each attendee. Our process shortens the registration time thus allowing more time for the attendee to network with peers. This same process is used for larger special events such as the annual holiday party and Paralegal Day.

The RSVP Subcommittee encourages Sustaining Members to assist at the check-in table as a way to see everyone coming in the door and obtain additional exposure during the luncheons. Typically we have one volunteer and two on busier months. CAPA Board members, who greet attendees as they enter the room, also assist in directing attendees to the correct registration table.

# **PUBLIC RELATIONS**

## **Francesca Romans, ACP, TBLS-BCP, Chair**

### *History and Purpose*

This committee was created by the CAPA board in 2014. Previously, the President-Elect served as Public Relations Liaison; however CAPA saw a need to form a specific committee to continue effectively promoting CAPA. The purpose of the Public Relations Committee is to promote CAPA as a professional organization and to educate all members as well as the public about the many benefits and programs CAPA has to offer its members. This committee is also tasked with monitoring and maintaining CAPA's positive image online and throughout the community.

### *Photo and Videos*

The committee helps organize photographers to take photographs at CAPA's meetings and events, and keeps track of the CAPA calendar to recruit photographers to attend and take photos at the monthly CLE luncheons and other specific special events. This committee also accepts and archives all CAPA event photos and videos as well as selecting specific photos to be published in CAPA's monthly e-newsletter, The Brief. The committee has been reaching out to members in an effort to expand the photos published for each event.

### *Spotlight Committee of the Month and Board Member of the Month*

The committee sets up a schedule to spotlight specific CAPA committees to be featured at each monthly meeting. The purpose of the monthly committee spotlight is to educate CAPA members about specific committee information, benefits, and to recruit committee volunteers. The spotlighted committee is also featured in CAPA's monthly e-newsletter, and on the events page of the website.

The spotlight schedule also assigns different board members and committee chairs to meet and welcome all CAPA members and guests at each of the monthly luncheons.

CAPA has been trying to encourage people who are interested in volunteering to shadow a board member or committee chair in order to learn more about the duties and time commitments of those positions.

### *Promotional Materials*

The committee has been working to update or completely redo CAPA's marketing brochures. As of this report, the committee has produced numerous event flyers, a benefits page, and advertisements for individual committees. The committee continues to utilize a banner purchased last year at specific events.

Last year's chair, Stephanie Sterling, has completed the set up for CAPA's online store, which is now set up for members to purchase CAPA t-shirts, mugs, tumblers, pad folios and tote bags, etc. The promotional store is linked on CAPA's website, and 10% of the purchase proceeds go to Easter Seals, which is CAPA's Flower Fund Charity for this term.

### *Social Media*

The committee monitors CAPA's social media pages and groups, and makes posts on behalf of CAPA regarding all CAPA activities and other pertinent legal events and information. CAPA currently has a LinkedIn group, a Facebook page, a YouTube Channel, an Instagram account, and is on Twitter. The Facebook and Instagram are the most active accounts, and are updated the most frequently. They are also the most successful, as we have seen an increase in traffic for both..

### *Speaking Events*

The committee works with the Student and Schools Liaison to set up speaking engagements at local paralegal schools to promote student membership in CAPA. The chair of the committee may also attend some speaking engagements on behalf of CAPA.

This year, CAPA had a table at the Austin Youth Career Fest for the third year in a row, and will also participate in a Career Fest for Round Rock Independent School District. This outreach to high school students has proven to be very effective, as many of the students have little to no knowledge of what a paralegal does.

In the near future, CAPA would like to establish a CAPA Ambassadors program to handle speaking events. It has been discussed that CAPA Ambassadors would be long time CAPA members who have volunteered in many capacities, CAPA Past Presidents, and/or other members who have knowledge of CAPA's history and member benefits.

### *Liaison to other local and state associations*

The committee is the liaison to the Paralegal Division of the State Bar of Texas and periodically connects with the Austin Bar Association, Austin Legal Administrators, Austin Legal Professionals, Austin Young Lawyers Association, Texas Bar College, and the Texas Board of Legal Specialization to work hand in hand in promoting various local events, information and benefits. CAPA has had great success in getting some of these organizations to attend events and assist in marketing CAPA events to the legal community.

## **PUBLICATIONS**

### **Carli Collins, TBLS-BCP, Chair/Editor**

The *Brief* is CAPA's monthly e-newsletter made available to all CAPA members. The mission of the *Brief* is to provide a forum for dissemination of information about CAPA's activities as well as the expression of its membership's professional interests.

The *Brief's* monthly features are a President's Message, an announcement of the month's CLE opportunities, upcoming events, calls for volunteers for various CAPA service activities, spotlight vendors, and a spotlight committee and board member. New additions to the Brief include a "Keepin' it Weird" section, which features a word of the day and various cartoons or fun facts.

## **RULES & BYLAWS**

### **Pamela M. Etie, ACP, and Francesca Romans, TBLS-BCP, Co-Chairs**

This committee is tasked with reviewing, updating, and revising all of CAPA's Bylaws, Standing Rules and Procedures and verifying that all correlate with one another. CAPA established Standing Rules last year, made several Bylaw amendments, and reworked its Procedures Manual to continue to carry out the purpose and goals of CAPA effectively.

CAPA's Bylaws, Standing Rules, and committee guidelines are made available on the CAPA website for all members to view.

CAPA also provides its Bylaws, Standing Rules, and Procedures Manual to all incoming Board members and Committee Chairs.



The committee also relies on Board members and Committee Chairs to advise about any necessary updates to the Procedures Manual for their respective positions every year. The goal is to keep all information and procedures updated continually, so that the Board members and Chairs are aware of the duties and responsibilities of their positions and specifics on how to accomplish those duties.

## **SCHOLARSHIP**

### **Vacant**

The Nancy McLaughlin Scholarship was set up in memory of Nancy Carmen McLaughlin, a dedicated and active legal assistant and CAPA member who made significant contributions to the development of the paralegal profession. The purpose of the Scholarship is to provide members with some financial support in pursuing the education and engagement necessary for career advancement. The Scholarship is offered twice a year, in January and July. Each scholarship is \$250, which can be used to pay for paralegal certification such as NALA's CP exam or the Texas Board of Legal Specialization exam, CLE, paralegal course credits, or membership to paralegal associations.

CAPA's scholarship is a benefit to working paralegals. CAPA does not want anyone who has a CP/CLA certification to lose it for lack of money needed to obtain the CLE required to maintain the certification. For those paralegals working at law firms that do not pay for CLE, this is a way for them to attend a seminar or pay for exam fees that they would otherwise be unable to afford. The committee also wants to help those members whose firms do not pay for their membership in CAPA so their memberships do not lapse. Applicants must submit a short application with a brief essay for consideration. A scholarship was awarded in Winter 2018 to Laura Kliman.

CAPA publicizes the scholarships by printing an article in the Brief, announcing the scholarships at CAPA meetings, posting the application on our website and social media, and sending out email blasts to all members. Even with all this publicity, the number of applicants is typically very low.

## **SCHOOL & STUDENT LIAISON**

### **Brittany Posadas, MBA, TBLS-BCP, Chair**

This committee is dedicated to bridging the gap between the Student Membership and local area paralegal schools and CAPA by introducing the School and Student Liaison. This new committee speaks at local area paralegal schools, acts as a direct resource and contact person for the Student Membership, and fosters building membership from area students.

In the past year, this committee has participated in the following events and activities:

- 2019 Youth Career Fest at the Palmer Events Center
- University of Texas at Austin Paralegal Program Graduation Ceremonies
- Several visits to area schools to speak to paralegal classes

The Chair also serves on the Advisory Board for the University of Texas at Austin Paralegal Program ("UT") to discuss changes to the current curriculum and to provide real-life insight into the paralegal profession in the greater Austin area. In addition to UT's Advisory Board, the Chair also serves on the Leadership Board for Texas State University's Legal Studies department to assist in providing a working paralegal perspective.

CAPA began offering to speak to the area schools during the semester by visiting a campus during a class to speak on eFiling, Calendaring and Case Organization, and Best Practices for Paralegals.

Last, but not least, the Chair facilitated group membership for all paralegal students of UT's Paralegal Program with CAPA, boosting CAPA's Student Membership and fostering a direct connection between the local paralegal program and the association.

## **SUSTAINING MEMBER LIAISON**

### **Debbie Hartzer and Ruth Konderla, Sustaining Member Co-Liaisons**

This committee is responsible for communicating with CAPA's Sustaining Members ("SMs"). The SM Liaisons impact CAPA in a huge way by informing vendors of the benefits of membership and to increase awareness of sponsorship opportunities. When necessary, the liaisons assist in soliciting door prizes and sponsorships from the vendors.

One of the benefits of Sustaining Membership in CAPA is the opportunity to be a spotlight vendor at the monthly luncheon. This spotlight opportunity allows the spotlight SM to set up a table with marketing materials and SWAG and gives them the "spotlight" for 1-2 minutes at the end of each luncheon, where they can tell the attendees about their company and services. Typically, CAPA arranges for two spotlight vendors each month. No other vendors are allowed to hand out information during the luncheons, which puts the spotlight vendors truly in the "spotlight." The Sustaining Member Liaisons work closely with the RSVP chair to provide a list of attendees each month to the spotlight vendors, which entices them to continue their membership. Sustaining members that are not the "spotlight" of the month are recommended in attending all monthly luncheons to support CAPA and bringing door prize is optional but also recommended.

Another benefit is an annual Vendor Expo during the June luncheon. This Expo was established in the mid-1990s by Nancy McLaughlin, a former president of CAPA, to showcase the vendors. Not only do the vendors get a chance to hand out marketing materials and SWAG, but each representative is allowed 2 minutes to give a short presentation. In addition to being persuaded by the promise of so much SWAG, CAPA members are encouraged to attend by all the large number of door prizes at this event.

The committee may be asked to work closely with the Social Events Committee to get sponsorships for happy hours, and with the Lunch & Learn Committee to get lunch sponsors.

To keep all vendors awareness and "in the loop," a quarterly/semi-monthly SM Newsletter are sent out informing the Vendors of upcoming sponsorship & spotlight opportunities and other reminders about CAPA.

## **WEB TEAM**

### **Jennifer Rogers, CP and Pamela M. Etie, ACP, Co-Chairs**

**Carli Collins, TBLS-BCP**

CAPA's website is powered by "Wild Apricot," a web-based software for small associations and non-profits to manage membership, website, events and other activities. The membership management platform allows our Membership Chair to manage the membership database—and provides automatic online application and renewal capabilities. The website builder platform allows the Web Team to manage and update web pages and integrates seamlessly with the membership and event management platforms.

The event management platform allows our Networking and Social Events Committee Chair to manage events for the membership directly on the website and our Programs Chair to manage our monthly membership/CLE, including online registration, waitlist capability that automatically registers people on the waitlist when spaces become available, and online payments. In addition, we schedule automatic event announcements to promote our events.

Our “Members-Only” section of the website includes pages for CAPA members to review Board minutes and financial reports, a member directory, the CAPA Job Bank, current and past versions of the *CAPA Brief* monthly newsletter, and a “Speaker Zone” page to make available copies of the presentations our speakers provide for CLE (with permission) as well as contact information for those speakers so that members can reach out to them for business opportunities or further information.

The CAPA web team completed a re-vamp of the website to refresh the images and keep our web presence exciting for our members that launched in January 2019. We have a donation link which allows our members to contribute to our annual flower fund charity online. We also offer an online store where members are able to purchase CAPA branded items and which donates 10% of each purchase to our flower fund charity. We use Election Buddy to allow our voting members the opportunity to vote on a choice of organizations to be selected to benefit from our flower fund charity every year. Our Freelance Paralegal Directory continues to be a popular feature. It offers freelance members an opportunity to be listed with their practice areas and contact information on the website.

We continue to offer online payment capability through PayPal for membership applications and renewals, CLE luncheons, and any event that requires payment. Our members use it regularly, and it has eased the congestion at the check-in table at our monthly luncheon. The reporting that is available to our members for their financial history with our organization is incredible. The invoices created by our website help with reimbursements from those who work in state government, or other organizations that offer reimbursement, (of which there are many in Austin).

A recent Wild Apricot update added a members’ mobile app which allows members to log in and view content drawn from our site, such as the member directory, a member’s profile, an event calendar and details, and their existing registrations. They can also use it to register for an event, and pay an outstanding event registration fee. (Currently, only an IOS version of the app is available.)

## **MENTOR OF THE YEAR AWARD**

### **Brittany Posadas, TBLS-BCP, Chair**

Last year, CAPA introduced a new award celebrating the hard working mentors of CAPA’s Mentor Program by adding the Mentor of the Year Award.

The Mentor of the Year Award seeks to recognize a mentor who has provided outstanding mentorship to a Student or Associate Member (protégé) in the Mentor Program.

Each nominee must be a member in good standing with CAPA. All persons submitting nominations must also be current members of CAPA who are in good standing. The nominee must have served as a Mentor

for the entire CAPA year (July 2017 to June 2018). The nominee must be nominated by either her/his protégé or the Mentor Program Chair or Co-Chair.

The Mentor of the Year Award was announced at the June 2018 Officer Installation and Vendor Parade and awarded to Joni Bures.

## **PARALEGAL OF THE YEAR AWARD**

### **Francesca Romans, ACP, TBLS-BCP**

This year's winner was member and chair of several committees, Francesca Romans. Francesca y will serve as next year's chair.

The chair is responsible for publishing a statement and nomination form in the newsletter and soliciting judges for a review panel, and subsequently submitting all nominations to the judges then receiving and collecting their ballots. The chair also chooses and orders a plaque, and presents the award/plaque and \$500 check to the recipient at the annual Paralegal Day Celebration.

## **PRESIDENT'S AWARD**

### **Kristina Kennedy, ACP, TBLS-BCP, Chair**

The President's Award for 2018-19 was presented to Stephanie Sterling at the June 2018 luncheon, by then-President Carli Collins. This year's award will again be presented at the June meeting. The President's Award may be awarded by the President to the elected officer who, in the President's opinion, has made the greatest impact on CAPA by supporting CAPA and the Board throughout the year (the recipient of the President's Award shall possess characteristics such as integrity, professionalism and above all, dedication to CAPA).

## **PRO BONO AWARD**

### **Amber Haney, Co-Chair and Stephanie Seuser, Co-Chair**

This award is presented at the June monthly membership meeting. A statement for Solicitation of Nominations (with established deadlines) will be published to run in the April and May editions of the newsletter. The Chair will advise all members of the appropriate requirements and format to submit nominations as well as information that the selection committee will consider in making its decision. Three local judges will be selected to participate, and will be provided with a copy of Solicitation of Nominations and a Ballot form to mark their selection. The Chair will tally the votes to determine the winner, and order the Pro Bono Award plaque.

## **VOLUNTEER OF THE YEAR AWARD**

### **The Board**

This award will also be presented at the June meeting. The Volunteer of the Year Award may be awarded by the President, after consulting with the Board, to the person(s) who fulfills an appointed or volunteer position or office and who stepped out from the crowd and served CAPA by volunteering and/or

participating in various CAPA activities throughout the year and/or over time. The 2018 Volunteer of the Year Award was presented to two well-deserving recipients, Joni Bures and Alice Duerr.