

The Texas Roundup

From the TALP Officers and TALP Committee Chairs

FOURTH EDITION

AUGUST 2010

Welcome to The Texas Roundup. This publication is meant to give you the latest and greatest news and information from around the state association.

PRESIDENT

Betty Wells, PP, PLS, TSC

Ongoing projects:

1. Forwarded NALS Foundation letter regarding contribution to Treasurer with request to confirm payment or pay if not paid;
2. Reviewed NALS rebate report and prepare letters to seven new members;
3. Reviewed budget, registration form, and schedule of events for 2011 Annual Conference;
4. Reviewed calendar for various deadlines;
5. Communicated with liaison chairmen regarding assignments (and their status of same);
6. Approved check requests;
7. Attended NALS Region 6 Annual Meeting in Jackson, Mississippi and prepared a recap which is attached;
8. Met with H. Wood regarding setup for business meeting at Fall Conference;
9. Met with Kerrville CVB Marketing Director regarding meeting facilities and what they can do for Texas ALP; forwarded materials to Donna Dendy, Meetings Coordinator, Co-Chair;
10. Responded to emails from various Region 6 members regarding 2011 Region 6 Meeting location and 2011 Texas ALP Fall Conference;
11. Mailed chapter anniversary letter;
12. Reviewed July issue of The Roundup and provided comments;
13. Telephonic meeting with Secretary Harrison regarding various matters;
14. Reviewed outdated Checklist for Call Items, revised as appropriate, and forwarded to Secretary;
15. Reviewed letter marketing Fall Conference to various Houston schools;
16. Sent an email to various chapter presidents regarding certification committee member;
17. Email Certification Chair regarding no volunteers to join committee at this time;
18. Send email to officers and Directors requiring vote to suspend SR 26.A.(3) regarding late bid received for 2011 Fall Conference;
19. Attended Professional Development committee meeting telephonically;
20. Attended NALS OLC Incentive session;
21. Traveled to Waco and met with President-elect Turner regarding expiration date of trademark, Docket media kit, permanent records, website, Awards, 2011 Annual Conference, 2010 Fall Conference, and EC meetings;
22. Provided Memo to Secretary Harrison for the Call;
23. Provided vote result to officers and Directors regarding suspension of SR 26.A.(3); and
24. Approved and signed Fall Conference CLE certificate.

Update on current projects:

1. Trademark is current through July 2017, renewal process should start six months prior to expiration;
2. Confirmed location of permanent records from May 2005 forward and determined best method for archiving.

Possible new projects to research and/or develop: None at this time.

Other information to share with TALP members: It is not too late to register for the Fall Conference in Houston, Texas. For more information, visit the website.

PRESIDENT-ELECT

Kristy Turner, PP, PLS, CLA, TSC-CL, TSC-RE

Reviewed and approved budget, registration form, and schedule of events for 2011 Annual Conference;
Reviewed calendar for deadlines;
Communicated with liaison committees and offered assistance as needed;
Made a site visit to the Holiday Inn Waco; and
Met with President Betty regarding expiration date of trademark, Docket media kit, permanent records, website, Awards, 2011 Annual Conference, 2010 Fall Conference, and EC meetings.

Update on current projects:

Completed work on Preference Sheet;
Determined Trademark current through July 2017; and
Located permanent records from May 2005 and determined best method for storing in the future.

Possible new projects to research and/or develop: None at this time.

TREASURER

Cheryl Wenzel, PP, PLS

Ongoing projects:

1. Communicated with liaison chairmen for the Finance Committee, Financial Review Committee, Education Committee, and Meetings Coordinator Committee.
2. Received check requests from President Betty to be processed for payment
3. Balanced checkbooks.

Update on current projects: Contacted Financial Review Committee to check status of review of Treasurer's records for September 1, 2009 through April 30, 2010.

Possible new projects to research and/or develop: None at this time.

Other information to share with the TALP Board: None at this time.

Additional information to go with 10th of month reports if President Betty wishes it to be printed this month:

Due to a glitch somehow this information was not included in the June 10th of the month reports and I feel it should be included for clarification purposes.

1. Established a share account at Capitol Credit Union in the amount of \$5.00 with funds from BoA checking account as per EC action.
2. Withdrew funds in the amount of \$21,743.07 from Bank of America CD account (earning 0.08% interest) and moved \$10,256.93 from BoA checking account to establish CD in the amount of \$32,000.00 at Capitol Credit Union as per EC action (earning 1.25% interest).
3. Opened interest-bearing checking account at Capitol Credit Union in the amount of \$5,000 with funds from BoA checking account as per EC action.

Closed BoA CD proceeds	\$21,743.07
Check written from BoA checking to open accounts at CCU	<u>\$15,261.93</u>
Total	\$37,005.00

CCU CD	\$32,000
CCU checking	\$ 5,000
CCU share account	<u>\$ 5</u>
Total	\$37,005

SECRETARY

Jane Harrison, PLS

Ongoing projects: Continue drafting and completion of minutes of EC Retreat; work on TALP history; sympathy card to Vanessa Brock, receipt of thank you card from Marcia Lefler.

Communications with liaison chairmen for which I am the liaison to get their reports in for July 10th.

Preparing the Call and communicating with many chairmen regarding information for the Call.

Update on current projects: Still working on TALP History and EC Actions.

Possible new projects to research and/or develop: None at this time.

Other information to share with the TALP Board: None.

PARLIAMENTARIAN

Julie Abernathy, PP, PLS

Ongoing projects: Assistance with state president with ongoing projects. Communications with liaison chairmen: bylaws/standing rules, certification, fall board meeting, and marketing.

Update on current projects: The Fall Conference is nearing and all liaison chairmen submitted items to be included in this meeting, where appropriate. No proposed bylaws or standing rules were submitted. As Parliamentarian, I provided the specific parliamentary procedures and guidelines to Secretary, Jane Harrison, for inclusion in the Fall Board Meeting "Call."

ANNUAL EDUCATIONAL CONFERENCE 2011

Samantha L. Tandy, PLS and Vanessa Brock, PLS, CLA

Ongoing Projects: The committee has been in contact with Marty Olson, Education Chairman to share ideas for topics and speakers.

Update on current projects: Working on details for the star party at the Planetarium and finalizing CLE topics.

Possible new projects to research and/or develop: The committee is continuing to research ways that we can streamline some of the events at the conference and is researching what avenues to market to legal personnel in our area.

Other information to share with the Texas ALP Board: None.

AWARDS

Patti T. Heaney, PLS

Ongoing Projects: Begin work with Midland chapter to locate judges for LPY judging; completed revisions on LPY application and guidelines as well as Scholarship application; communications with liaison officer – Jane Harrison.

Update on Current Projects: Will continue work on judging candidates and prepare for upcoming education conference in Houston; plan to meet with past chairman for answers to questions.

BYLAWS/STANDING RULES

Jorie Licking, PP, PLS

No report.

CERTIFICATION

Fay M. Jordan, PP, PLS

Ongoing projects:

Possible cram session at September TALP meeting or weekend prior to March Exams: no new information.

Update on current Projects:

Complete Certification Committee membership. Will work with current members.

Letters to employers of new members regarding NALS certification available: pending.

Prepare TALP Certification Brochure for inclusion in TALP Membership Packets: pending

Requested by Jane Harrison to assist in TALP History: Completed.

Inventory TALP Certification Files: Completed

Possible new projects to research and/or develop:

Certification Committee may take a new approach to helping local chapters with certification: helping them to set up their own study groups and local cram sessions rather than holding one cram session. More information will follow as this develops.

E-DISTRIBUTOR/ROSTER

Rita C. Alesi, PP, PLS, TSC

Ongoing Projects:

- Maintenance of roster and e-distribution databases.
- Preparation of Official Roster for Fall Educational Conference.
- Maintenance of officer and committee chairman miniroster.
- Distribution of messages to the membership as requested.

Update on Current Projects:

- Official Roster—JPEG photos of the TALP and chapter officers have been requested to include in the Official Roster. We have received seven responses.

E-distributions—Work is continuing with the database host to correct the e-mail format issue where html messages are sent, but our members are receiving the messages in plain text. If this issue has not been resolved with the next e-distribution message, the database will be moved to a new hosting site.

EDUCATION

Marty Olson, PLS, TSC-RE

SAVE THE DATE!!! Saturday, February 19, 2011

WHERE: Austin

TIME: 8-5

We are planning a half day of intellectual property law and a half day of the following topics: real estate, litigation, corporate, and ethics.

HAVE YOU HEARD? NALS offers online study groups and Webinars:

Online Learning Center (OLC):

August 18, 2010—PP Review-Concentration of Substantive Law (NALS Education) (1 hr. CLE)

Sept. 1, 2010—Membership (NALS Membership) – FREE TO MEMBERS

Sept. 22, 2010—Test Taking Tips (NALS Certifying Board) – FREE TO MEMBERS

Online Study Group (OLSG):

August 10, 2010—Written Communications (NALS Education) (1 hr. CLE)

August 17, 2010—Office Procedures/Legal Knowledge (NALS Education) (1 hr. CLE)

August 24, 2010—Ethics, Human Relations (NALS Education) (1 hr. CLE)

Sept. 7, 2010—ALS Review (NALS Education) (1 hr. CLE)

Sept. 14, 2010—PLS Review (NALS Education) (1 hr. CLE)

Sept. 21, 2010—PP Review (NALS Education) (1 hr. CLE)

Webinars:

August 12, 2010—Everything You Wanted to Know About the NALS 59th Annual Education Conference & National Forum (NALS Marketing) - FREE TO MEMBERS

August 19, 2010-Think Big—Insight to the knowledge needed to serve at the national level (NALS N&E)-FREE TO MEMBERS

August 26, 2010-Written Communication/Grammar Part IV—(NALS WebEd) (1 hr. CLE)

Sept. 2, 2010-Written Communication/Grammar Part V—(NALS WebEd) (1 hr. CLE)

Sept. 9, 2010-Written Communication/Grammar Part VI—(NALS WebEd) (1 hr. CLE)

To find out more about the online study groups and Webinars, simply go to the NALS Web site.

FALL EDUCATIONAL CONFERENCE (2010)

Sondra Heugatter, PP, PLS, TSC-CL, TSC-RE

The coffee break letters have been mailed.

We have been receiving registrations from members.

As any chapter who has hosted a meeting knows, this is the quiet time before the storm hits. **The quoted room rate for the Magnolia Hotel expires August 17.**

The regular registration deadline is August 31.

The registration form and schedule of events have been forwarded for the Call, along with a flyer for the meeting. The Committee is working to be ready for our guests for a weekend of networking and education in Houston.

FINANCE

Kim Culpepper, PLS, TSC and Dianna Roberts, PLS, TSC

Ongoing Projects: The Finance Committee continues to research new finance items and ways to increase income for the association.

Update on Current Projects: The Finance Committee is in the process of preparing for the Fall Board Meeting. It has provided a flyer for the "All Season" Raffle to be included in The Call and is also attached to this report. The Finance Committee wishes to thank the TALP members in advance for their support of TALP by providing items relating to the different seasons of the year for the raffle. This is greatly appreciated. Please note that there will be a choice of premium prizes.

Possible New Projects to Research and/or Develop: The Finance Committee is working on different ways to market the various finance items available. One way is by providing an order form for The Docket.

Other Information to Share with the TALP Board: Nothing at this time.

See attached flyer regarding the Fall Conference Raffle.

FINANCIAL REVIEW

Rebecca Widner

No report.

MARKETING

Leslie G. Stokes, PP, PLS, TSC-CL

No report.

MEETINGS COORDINATOR

Donna Dendy, PP, PLS, CLA, TSC and Kathie Jean Keys, PP, PLS

Ongoing projects: (1) Encourage chapters to host annual/fall conferences; (2) improve guidelines for chapters relating to vendors, speakers, and coordination with Texas ALP counterparts; (3) provide assistance to chapters currently hosting conferences; and (4) develop survey questions on meetings structure to send to the membership through Ballot Box.

Update on current projects: This committee is continuing to work with the Strategic Planning Committee to prepare the Texas ALP 2010 Strategic Plan. Working with Waco LPA to submit items for inclusion in the Call for the 2010 Fall Conference to host the 2011 Fall Conference.

Possible new projects to research and/or develop: With the EC's approval, conduct a workshop at a future conference entitled "Hosting a Successful Meeting."

Other information to share with the Texas ALP Board: Make the Meetings Coordinator a direct contact with the chapters who are hosting upcoming meetings and to those chapters who are thinking about hosting meetings (i.e., review the bids received by chapters to host and also conduct hotel inspections chosen for upcoming meetings) along with the Texas ALP President and/or any other liaison officer so chosen by the Board.

MEMBERSHIP

Samantha L. Tandy, PLS

Ongoing Projects: Communication with members who renew and incoming members to find out what needs they have. Send out birthday wishes to members.

Update on current projects: Finalized membership incentive for campaign. Telephone conferences with LMCs to find out what is going on in each of the local chapters. Sent e-mails to members who have not been at a conference in a while inviting them to attend the Fall Conference in Houston.

Possible new projects to research and/or develop: Work with LMCs to implement the membership campaign.

Other information to share with the Texas ALP Board: The LMCs are doing a great job and working hard to accomplish some good goals. GOOD JOB LMCs!!!!!!

NOMINATIONS AND ELECTIONS

Bette A. Tower, PLS

No report.

PROFESSIONAL DEVELOPMENT

Karen Branigan, PLS

Ongoing projects: Researching ideas for P.D. luncheon at the meeting in 2011.

Update of current projects: Plans are coming along for the Professional Development Luncheon at the Fall Seminar in Houston. The committee held a teleconference for planning, and I have had several e-mail discussions with Helene Wood to make arrangements for the luncheon, including menu choices and plans for audio/video equipment. I have also prepared a flyer for the luncheon to be used in the Call and have submitted it to Secretary Harrison as requested.

Possible new projects to research and/or develop: None at this time.

Other information to share with the TALP Board: None at this time.

REGION 6 2011 ANNUAL MEETING

Sharon Simpson, PLS

No report.

STRATEGIC PLANNING

Mary Bullard, CLA, TSC-RE

Ongoing projects: Revising/Updating 2004 Strategic Plan

Update on current projects:

Members of the SP Committee are working with their committees/task forces and are to submit their input for the committee/task force sections by September 1.

The mission/vision/core values and history sections of the plan were drafted and submitted to the SP Committee members for review and return by August 6. The overall goals of and strategies from the association mission statement were drafted.

Possible new projects to research and/or develop:

None at this time.

Other information to share with the Texas ALP Board:

The draft of the plan is on schedule for distribution at the Fall Educational Conference as requested by the EC.

THE TEXAS DOCKET

Tina Hurley, PP, PLS

No report.

WEBMASTER

Scotti Beam, PP

During the months of June and July 2010, this committee has posted The Docket to the website, as well as made other requested revisions to the website.

August 2010 Itemized Categories - YTD

5/1/2010 through 8/9/2010

8/9/2010

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Date	Account	Num	Description	Memo	Tag	Cir	Amount
INCOME							8,381.92
	Docket -- Ads						45.00
	Dues						1,465.00
	Finance -- Sale Of Photo CD						220.00
	Finance -- Sales of Logo Items						513.00
	Interest Income						43.54
	NALS Resource Center						515.00
	Texas ALP Meetings						3,705.38
	Unbudgeted						1,875.00
EXPENSES							15,574.61
	Awards						-25.00
	Deposit For Meeting						-1,000.00
	Docket -- Postal						-15.86
	EC Lodging						-831.45
	Fidelity Bond						-117.00
	Finance						-13.52
	Marketing						-50.00
	NALS Ads						-25.00
	NALS Fndn Auction Donations						-20.99
	NALS Foundation Circle Donation						-1,000.00
	NALS Meetings						-1,019.12
	NALS President (TALP AC expenses)						-148.35
	Officer-Chairmen Registrations						-550.00
	Other (Unbudgeted)						21,571.06
	Past President's Pin & Plaque						-273.64
	Scholarship						-750.00
	Shipping & Postage						-37.02
	Web Page						-119.50
OVERALL TOTAL							23,956.53

August 2010 budget - Current Year
5/1/2010 through 4/30/2011 Using Budget 2010-2011

8/9/2010

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Category Description	5/1/2010 Actual	- Budget	4/30/2011 Difference
INCOME			
Docket -- Ads			
Other Docket -- Ads	45.00	500.00	-455.00
TOTAL Docket -- Ads	45.00	500.00	-455.00
Dues	1,465.00	7,500.00	-6,035.00
Education	0.00	1,200.00	-1,200.00
Finance -- Sale Of Photo CD	220.00	0.00	220.00
Finance -- Sales of Logo Items			
Other Finance -- Sales of Logo Items	513.00	2,000.00	-1,487.00
TOTAL Finance -- Sales of Logo Items	513.00	2,000.00	-1,487.00
Interest Income	43.54	200.00	-156.46
Other Income	0.00	500.00	-500.00
Texas ALP Meetings			
Other Texas ALP Meetings	3,705.38	5,000.00	-1,294.62
TOTAL Texas ALP Meetings	3,705.38	5,000.00	-1,294.62
TOTAL INCOME	5,991.92	16,900.00	-10,908.08
EXPENSES			
Awards	25.00	130.00	105.00
Docket -- Postal	15.86	200.00	184.14
Docket -- Printing	0.00	1,000.00	1,000.00
EC Lodging	831.45	2,000.00	1,168.55
Fidelity Bond	117.00	120.00	3.00
Finance	13.52	750.00	736.48
Marketing			
Other Marketing	50.00	750.00	700.00
TOTAL Marketing	50.00	750.00	700.00
Membership	0.00	100.00	100.00
NALS Ads	25.00	0.00	-25.00
NALS Fndn Auction Donations	20.99	200.00	179.01
NALS Foundation Circle Donation	1,000.00	1,000.00	0.00
NALS Incoming President's Reception	0.00	0.00	0.00
NALS Meetings	1,019.12	4,200.00	3,180.88
NALS President (TALP AC expenses)	148.35	1,000.00	851.65
NALS Presidents' Gift	0.00	100.00	100.00
Nominations & Elections	0.00	500.00	500.00
Officer Registrations	0.00	1,450.00	1,450.00
Other (Unbudgeted)	-21,571.06	200.00	21,771.06
Past President's Pin & Plaque	273.64	300.00	26.36
Printing-Copying	0.00	100.00	100.00
Regional Assessment	0.00	300.00	300.00
Sales Tax	0.00	250.00	250.00
Scholarship	750.00	1,500.00	750.00
Shipping & Postage	37.02	500.00	462.98
Supplies	0.00	350.00	350.00
Web Page	119.50	300.00	180.50
TOTAL EXPENSES	-17,124.61	17,300.00	34,424.61

AUTUMN SPRING SUMMER WINTER

TEXAS ALP FALL BOARD MEETING

ALL SEASON RAFFLE

SUPPORT TEXAS ALP

BRING A RAFFLE ITEM FROM ANY SEASON

AUTUMN SPRING SUMMER WINTER

REGION 6 MEETING RECAP

*Pearl, Mississippi
July 15 - 17, 2010*

BETTY WELLS, PP, PLS, TSC
TEXAS ALP PRESIDENT

My husband and I travelled to Pearl on Thursday so I could attend the Region 6 meeting and he could do a little fishing. After settling in, we visited with old and new friends at the welcome party by the pool. After the reception a large group of conference attendees had a home cooked meal at the Cracker Barrel, just down the street from the Hilton Garden Inn, the site of the conference. Following is a recap of the weekend in Pearl with fellow Region 6 members.

The meeting began Friday morning with a welcome from the Region 6 Director, Tina Hurley, PP, PLS (Texas). Tina introduced and thanked the committee members and covered the schedule for the day. The morning was filled with CLE covering domestic relations, workers compensation, and child custody, visitation and support. The Mayor came by and welcomed the members to Pearl and encouraged us to do a little shopping while we were in town. After lunch we learned about sports law and torts. My husband and Misty Lewis's husband went to Bass Pro Shop for the afternoon. After the sessions were over for the day it was time to share a good meal with our friends. We walked to the Lone Star Café and Texas members were right at home in the Alamo Room. Then the group headed to the local movie house for a movie of our choice. The Hospitality Suite was open until midnight and was the perfect place to network, talking about the fantastic speakers we heard earlier in the day.

My husband was up and out the door by 5:15 a.m. for his fishing trip with Michael Lewis. Saturday started with breakfast, cooked to order for me. With coffee in hand, we headed in to the meeting room where our topics covered revocable trusts, veteran's benefits, and elder law. We had a few hours to do the shopping the Mayor had encouraged us to do and then we headed back to the hotel for the business meeting portion of the Region 6 Meeting.

The meeting was attended by 47 members, nine guests, and four first timers. The raffle raised \$1465 and it was decided to donate the monies to the Foundation, split money between the states in the region, and place an ad in the NALS program for the Branson meeting. During the meeting we learned Region 6 is the only region with a website. The Foundation canvas bag that will be auction off in Branson will be a pamper me bag. If you would like to contribute a "feel good" item for the bag, contact Misty Lewis, Mississippi State President to work out delivery. Attendees were reminded of the August 1 deadline to send Foundation donations for Branson to headquarters, and to submit the Foundation leadership scholarship application. After hearing from each state president in attendance regarding events in their state, the attendees chose Amarillo, Texas for the location of the 2011 meeting. More information will be coming soon.

Oklahoma will be celebrating its 50th anniversary in 2013 and has traded their year to host the meeting with Missouri who will host in 2012. Terry Houston reminded members about the online seminars and encouraged members to attend them. After a special presentation to Tammy Hailey, the winning tickets for the NALS Foundation raffle items were drawn. After dinner at Hal & Mal's, we played pub trivia. The competition was fierce and the evening ended with a tie breaker session.

The meeting concluded Sunday morning with another cooked to order breakfast followed by Sunday blessings.

I encourage each of you to make your plans now to attend the 2011 Region 6 meeting being held in Amarillo, Texas. The Texas ALP committee members and the members of NALS of Amarillo will be working hard to get us great hotel room rates, fabulous CLE speakers, a delightful evening in the Palo Duro Canyon watching the play Texas, and a wonderful opportunity to network with members from across the region. It will be a meeting you will regret missing. Don't be disappointed; mark your calendar as soon as possible. I'll see you there!