

# TEXAS ROUNDUP

SEPTEMBER 2009

**NOMINATIONS & ELECTIONS NEEDS YOU TO KNOW:** In sending out our recent electronic survey, we got nearly 100 bounce backs on old or insufficient email addresses. If you DID NOT receive an email from BallotBin or Patti Heaney, please email Patti at [pheaney@vbllp.com](mailto:pheaney@vbllp.com) with your correct email address. The survey will remain open until September 18th and we'd love to get your input.

## President – Mary Smith, PP, PLS

In addition to my regular duties – sending welcome letters to new members; reviewing the Roundup; responding to e-mails from members; and acting as liaison to the Membership, Education and Web site Committees - I have also written an article for the October Docket; reviewed proposed finance items; reviewed proposed 2010-2011 budget; reviewed and updated LPY and Scholarship applications forms and guidelines; reviewed Spirit Award application form and guidelines; received and reviewed bid from Houston ALP for the 2010 Fall Conference; and prepared agendas for the EC meeting and the 2009 Fall Board of Directors meeting.

My heartfelt thanks to each of you who have adhered to your deadlines because, as you know, meeting deadlines is the key to our association functioning successfully. Please note:

October 1 – close of nominations for 2010-2011 officers

October 2-3 – 2009 Fall Conference, San Antonio, Texas

October 10 – 10<sup>th</sup> of the month reports due to President-elect Betty Wells

Hope to see you in San Antonio!

## President-elect – Betty Wells, PP, PLS, TSC-RE

Since last month, I have performed the following:

1. Responded to emails and telephone calls from members;
2. Communicated with the 2010 Annual conference, Nominations & Elections, Strategic Planning, and Professional Development committees as liaison officer;
3. Reviewed and provided corrected information to the Official TALP Roster;
4. Reviewed the bid received from Houston ALP for the 2010 Fall Conference;
5. Began working on EC meeting agenda;
6. Contacted various members to serve as chairmen and committee members during the 2010-11 association year; and
7. Continued building new TALP website.

**NOTE:** *Committee Preference Sheet is on page 7.*

## Treasurer – Kristy Turner, PP, PLS, CLA, TSC-CL, TSC-RE

Since last month, I have performed the following duties:

1. Received and timely deposited funds;
2. Written checks as approved by President, Mary Smith;
3. Filed the 990N (e-postcard) with the IRS; and
4. Communicated with my liaison committee chairs.

**NOTE:** *Reports are founds on pages 5 and 6.*



Secretary – Jorie Licking, PP, PLS

During the months of August and September, I have worked on finalizing the Call. I then sent it to Rita Alesi for e-distribution and mailed it to those members without access to email. I am currently finalizing the reports to be sent out to the members prior to the Fall Conference in San Antonio. I have also been working with my various committees on different things. The Awards Committee will be awarding a new Spirit Award at the Fall Conference.

Someone asked me the other day what membership in Texas ALP meant to me. I can honestly tell you, for me, it has meant a lot. Just the other day, I needed to find a local process server in Dallas. It was Thursday afternoon before Labor Day Weekend and my boss told me he wanted to get a summons served on Friday before the long weekend. El Paso is a looonnnnggg way from Dallas and I didn't know of a company. I contacted one of our members in the Dallas area and she told she knew just the person to help me. It worked perfectly and the summons was served on Friday. **NETWORKING!!** That is just one example I can think of, but there have been many other instances when I have been able to contact a member in another city and ask them for some help. Our association is great!!!!

I hope to see you all in San Antonio for some more valuable networking opportunities.

Jorie

Parliamentarian – Donna Dendy, PP, PLS, CLA, TSC

Since last month, I have performed the following:

1. Communicated with my liaison chairmen;
2. Reviewed proposed new items for finance table;
3. Worked with the Roster Committee in preparing the Official Roster;
4. Reviewed information provided in the Call; and

5. Assisted President Mary and the Executive Committee as requested.

2010 Annual Conference – Diane Watters

The members of the committee are hard at work lining up exhibitors and sponsors. Marketing is planned for the meeting in San Antonio. Looking forward to everyone coming to Austin.

Awards – Cynthia Barrett, PP, PLS, TSC

The deadline to nominate a fellow member for the Spirit Award by September 15<sup>th</sup> is fast approaching! The nomination form and the rules are attached to this issue of the Roundup. If you have any questions, please feel free to contact any member of the Awards Committee: Cynthia Barrett at [cellisbarrett@yahoo.com](mailto:cellisbarrett@yahoo.com), Marlena Johnson at [mjohnson@lglawfirm.com](mailto:mjohnson@lglawfirm.com), or Cheryl Moseley at [cmoseley@qsclpc.com](mailto:cmoseley@qsclpc.com). The recipient of the Spirit Award will receive a certificate and \$25 in TALP Bucks to be applied toward the recipient's registration fee for the 2010 Annual Educational Conference.

**NOTE:** *The rules and nomination form can be found on pages 8 through 12.*

Bylaws/Standing Rules – Faynell Poe, PP, PLS

Proposed amendments were submitted to officers, directors, and chairmen for review and all questions concerning the proposals have been answered.

Education – Scotti Beam, PP

The Education Committee is working hard on upcoming events.

- Fall Education Conference Topics include:
  - International Law
  - Civil Litigation
  - Eminent Domain (Condemnation)
  - Guardianships
  - Labor and Employment Law
  - Ethics



- SALSA is hosting its Annual Day in Court Luncheon
  - This is an optional event; please see registration form for details
- February Only CLE Event Topics include with more information coming soon:
  - Estate Planning
  - Criminal Law
  - Ethics
  - Personal Injury with a rodeo flair

*2009 Fall Educational Conference – Cheryl Wenzel, PP, PLS*

Registration forms are coming in and we are very excited. We can't wait for everyone to arrive and visit San Antonio. The hotel is very happy to be welcoming our group in just a few weeks. You just won't believe the stuff you will be getting in your boodle bags too. The committee has worked very hard at getting items from local businesses and they will be just stuffed with fun items for everyone.

We have cornered the Fourth Court of Appeals for speakers for our lunches that weekend. At the Day in Court Luncheon, we have the Honorable Justice Sandee Bryan Marion and at the Professional Development Luncheon, we have the Honorable Justice Catherine Stone. FYI, Justice Stone is an Honorary Member of SALSA, so she is one of the girls.

Also, be on the lookout for SALSA's Annual Scholarship raffle tickets. The first prize is a two-night package at the Grand Hyatt Hotel, San Antonio, Texas, with breakfast for two, a bottle of wine and other fun things and the second prize is a two-night package at Ye Kendall Inn, Boerne, Texas, with dinner for two at El Rio, Boerne, Texas, a bottle of wine and other fun things too. The tickets are \$5 each or 5 for \$20. The drawing will be during the Day in Court Luncheon on Friday, October 2, 2009. You do not need to be present for the raffle drawing to win. Day in Court door prizes, you have to be present.

*Finance – Kim Culpepper, PLS, TSC and Dianna Roberts, PLS, TSC*

**Reminder:** Please support Texas ALP and bring a raffle item for any holiday in October, November, or December to the Fall Board Meeting. Also, please let Kim Culpepper know what item you are bringing or at least that you plan to bring something so that we will have supplies available. Kim's e-mail address is [klculpepper@sbcglobal.net](mailto:klculpepper@sbcglobal.net). A premium prize will be offered!!

*Strategic Planning – Laurie Brantley, PLS*

The Strategic Planning Committee is planning a roundtable discussion during the Committee Meetings session at the Fall Educational Conference on Friday morning, October 2, 2009, to discuss revisions to the Strategic Plan and the need for a vision statement. As stated in an earlier report, a **vision** is a **statement** about what the association wants to become and is an image of itself. It gives shape and direction to the association's future. All members attending the Fall Educational Conference should make plans to attend. The roundtable discussion will take place during the last half of the Committee Meetings session on Friday morning, October 2, 2009.

**NOTE:** Please see the flyer on page 13.

*Credentials – Theresa Ann Alba, PLS*

The Credentials Chair has been in contact with her Committee members, as well as Samantha Tandy, Chairman of the Professional Development Committee regarding Pay It Forward Program. At the present time, we have no First Timers registered to attend the Fall Education Conference in San Antonio, Texas. No further actions have been taken.



*Professional Development – Samantha Tandy, ALS*

The Professional Development committee has gathered questions to pose to Chapter Directors for the next Docket publication.

We are still continuing to work on speaker ideas for the Annual Meeting in Austin.

*Special Report From Region 6 Director – Tina Hurley, PP, PLS, TSC*

**2011 Region 6 Annual Conference – It's TALP's Turn**

The hosting state for the Region 6 Annual Conference ("R6 Conference") is currently rotated between the states in the region: AR, LA, MO, MS, OK, and TX, with Louisiana being the only state that does not have a state chapter, although the 2007 R6 Conference was hosted by Oklahoma but held in Shreveport, Louisiana. In 2011, the rotation comes back to Texas. In 2006, the meeting was

held in Dallas (Richardson) and was co-hosted by Dallas ALP and Greater Dallas ALP. In 2001, when it was hosted by Texas previously, it was held in San Antonio.

In 2009, the R6 Conference was hosted by AALS, the Arkansas state chapter, with the committee members being from all chapters across the state. The city chosen to host the conference needs to be easily accessible for air travel. The city chosen doesn't necessarily need to have a local chapter, but it would be helpful for the purpose of obtaining speakers. The duties can be spread across the state. For instance, one chapter can be in charge of registration, one can take care of vendors and sponsors, one can take advertising, etc. The state is the one "hosting" the event. Currently, profits from the R6 Conference are split 50/50 between the hosting state/chapter and the Region with the Region's portion used to maintain our NALS Foundation Circle level donation.



Budget-May 1 to August 31, 2009 - Current Year:2

5/1/2009 through 4/30/2010 Using 2009-10 Budget

9/10/2009

Page 1

Category Description	5/1/2009 Actual	- Budget	4/30/2010 Difference
<b>INCOME</b>			
Docket -- Ads	0.00	500.00	-500.00
Dues	2,105.00	7,500.00	-5,395.00
Education	0.00	1,200.00	-1,200.00
Finance -- Sale Of Photo CD	445.00	325.00	120.00
Finance -- Sales of Logo Items	723.00	1,200.00	-477.00
Interest Income	0.00	500.00	-500.00
Other Income	0.00	1,000.00	-1,000.00
Secondary Membership Dues	20.00	0.00	20.00
Texas ALP Meetings	3,498.84	4,000.00	-501.16
<b>TOTAL INCOME</b>	<b>6,791.84</b>	<b>16,225.00</b>	<b>-9,433.16</b>
<b>EXPENSES</b>			
Awards	0.00	130.00	130.00
Docket -- Postal	0.00	200.00	200.00
Docket -- Printing	0.00	200.00	200.00
EC Lodging	531.10	750.00	218.90
Fidelity Bond	117.00	120.00	3.00
Finance	0.00	750.00	750.00
Marketing	0.00	750.00	750.00
Membership	0.00	100.00	100.00
NALS Ads	275.00	750.00	475.00
NALS Fndn Auction Donations	93.90	200.00	106.10
NALS Foundation Circle Donation	500.00	500.00	0.00
NALS Meetings	423.55	3,500.00	3,076.45
NALS President (TALP AC expenses)	159.32	1,000.00	840.68
NALS Presidents' Gift	30.00	100.00	70.00
Officer Registrations	500.00	1,250.00	750.00
Other (Unbudgeted)	784.33	200.00	-584.33
Past President's Pin & Plaque	268.23	200.00	-68.23
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	16.88	500.00	483.12
Supplies	0.00	350.00	350.00
Web Page	233.77	500.00	266.23
<b>TOTAL EXPENSES</b>	<b>4,683.08</b>	<b>14,200.00</b>	<b>9,516.92</b>
<b>OVERALL TOTAL</b>	<b>2,108.76</b>	<b>2,025.00</b>	<b>83.76</b>



Income/Expense by Category - YTD  
5/1/2009 through 9/9/2009

9/9/2009

Page 1

Category Description	5/1/2009- 9/9/2009	OVERALL TOTAL
<b>INCOME</b>		
Dues	2,105.00	2,105.00
Finance -- Sale Of Photo CD	445.00	445.00
Finance -- Sales of Logo Items	723.00	723.00
Secondary Membership Dues	20.00	20.00
Texas ALP Meetings	3,498.84	3,498.84
<b>TOTAL INCOME</b>	<b>6,791.84</b>	<b>6,791.84</b>
<b>EXPENSES</b>		
EC Lodging	531.10	531.10
Fidelity Bond	117.00	117.00
NALS Ads	275.00	275.00
NALS Fndn Auction Donations	93.90	93.90
NALS Foundation Circle Donation	500.00	500.00
NALS Meetings	423.55	423.55
NALS President (TALP AC expenses)	159.32	159.32
NALS Presidents' Gift	30.00	30.00
Officer Registrations	500.00	500.00
Other (Unbudgeted)	784.33	784.33
Past President's Pin & Plaque	268.23	268.23
Scholarship	750.00	750.00
Shipping & Postage	16.88	16.88
Web Page	233.77	233.77
<b>TOTAL EXPENSES</b>	<b>4,683.08</b>	<b>4,683.08</b>
<b>OVERALL TOTAL</b>	<b>2,108.76</b>	<b>2,108.76</b>





***COUNT ME IN!***  
***I want to be on the***  
***2010-2011 Texas ALP Leadership Team***

Name: \_\_\_\_\_  
 Chapter: \_\_\_\_\_  
 Preferred Mailing Address: \_\_\_\_\_  
 Work Telephone: \_\_\_\_\_ Home Telephone: \_\_\_\_\_  
 Cell Phone: \_\_\_\_\_  
 Home Email Address: \_\_\_\_\_  
 Work Email Address: \_\_\_\_\_  
 (Please mark preferred telephone and email contact)

Although not mandatory, attending the Committee Chairmen/Committee Member training on April 30, 2010 is definitely encouraged. You'll have an opportunity to meet fellow committee members, as well as plan and calendar committee projects for the upcoming year. More importantly, you will have FUN!

Will you be able to attend the meeting? \_\_\_\_\_ Yes \_\_\_\_\_ No

Please return this completed committee preference form to:

Betty Wells, PP, PLS, TSC  
 2408 Shiloh Drive  
 Austin, Texas 78745  
 Email: [bettywells@austin.rr.com](mailto:bettywells@austin.rr.com)

***Don't delay, volunteer today!***

*Please indicate your first, second, and third choice*

1	2	3	Committee
			2011 Annual Conference
			Awards
			Bylaws/Standing Rules
			Certification
			Credentials
			E-Distributor
			Education
			2010 Fall Conference
			Finance

1	2	3	Committee
			Financial Review
			Marketing
			Membership
			Nominations & Elections
			Professional Development
			Roster
			Strategic Planning
			The Texas Docket
			Webmaster



**TEXAS ASSOCIATION OF LEGAL PROFESSIONALS  
RULES AND REGULATIONS  
SPIRIT AWARD**

**TO:** ALL TEXAS ALP MEMBERS

**FROM:** Cynthia Barrett, PP, PLS, TSC-CL  
TALP Awards Chairman  
Address: 16615 North Meadow Dr.  
Houston, TX 77073  
Tel: 281.443.0506  
E-mail: cellisbarrett@yahoo.com

**SUBMISSION DEADLINE**  
September 15, 2009

- A. The Texas Association of Legal Professionals Spirit Award shall be presented at the Fall Conference each year. Any member in good standing of the Texas Association of Legal Professionals who embodies the spirit and excitement of their chapter and the Texas Association of Legal Professionals is eligible to compete for the Spirit Award.
- B. The nomination of any member for the Spirit Award must be received from an active member in good standing with the Texas Association of Legal Professionals. Nominations will not be accepted from any local chapters. Nominees may not have been a Spirit Award recipient in any of the prior three years.
- C. All entries must be submitted on the nomination form (or a photocopy thereof) to the Awards Chairman. If additional space is needed to complete any section, use the back of the page. Observance of the *300-word limit* specified under “*Comments by Nominating Member*” is required. If the Awards Chairman finds that material in this section contains the use of numbers, the most current edition of *The Gregg Reference Manual* will be the deciding authority on how numbers will be counted in the tabulation of the word limit specified. The use of “and/or” will be counted as two words in the tabulation of the word limit specified. *Nominations will be disqualified if the “Comments by Nominating Member” exceeds the 300-word limit.*
- D. No testimonial letters or other support documentation will be considered by the Awards Committee.
- E. All nominees will be judged on the following basis:

<i>Nominating member’s evaluation</i>	50%
<i>Nominating member’s supporting statement</i>	50%

- F. All qualified entries will be submitted to the Awards Chairman. All nominations will be reviewed by the Awards Committee and a member will be chosen for receipt of the Award. The Award will be presented at the Fall Conference.
- G. To be eligible for judging, all entries must be (1) hand delivered or emailed to the Awards Chairman (at the address listed above) no later than September 15, 2009, or (2) postmarked by the United States Postal Service on or before September 15, 2009, or (3) validated by an overnight delivery service that such parcel was placed in such service's depository on or before September 15, 2009, and received by the Awards Chairman on or before September 18, 2009. An email confirming receipt of your nomination will be sent to you upon receipt of the nomination form. If you do not receive an email confirmation by September 20, 2009, it is the Nominating Member's responsibility to contact the Awards Chairman to make certain the nomination was timely received. The Awards Chairman will eliminate any material received after the applicable deadline.
- H. The member receiving the highest overall rating from the above criteria will be selected as the recipient for the Texas Association of Legal Professionals' Spirit Award. In the event of a tie, the Awards Committee will re-evaluate the tied nominations, and will make a final decision.
- I. All nominees are encouraged to attend the Fall Educational Conference.

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**TEXAS ASSOCIATION OF LEGAL PROFESSIONALS**

***SPIRIT AWARD NOMINATION FORM***

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

LOCAL CHAPTER: \_\_\_\_\_

DATE: \_\_\_\_\_ DATE RECEIVED BY CHAIRMAN: \_\_\_\_\_

**A. EVALUATION BY NOMINATING MEMBER (rank each item with a 1, 2, 3, 4, or 5, with 1 representing the lowest value and 5 representing the highest value):**

1. Abides by the Standing Rules and Bylaws of the Association.
2. Demonstrates the ability to make suggestions for the local chapter or Texas ALP.
3. Organizes and coordinates to complete tasks in a timely manner; meets local chapter or Texas ALP Committee deadlines.
4. Adjusts readily to new assignments or changes in procedure.
5. Attends chapter meetings regularly.
6. Realizes benefits of continued membership in the Association and freely shares those with prospective and current members.
7. Exhibits ingenuity and creativity in developing new or improved methods or approaches.
8. Maintains effective working relationships with fellow association members.
9. Has attended or plans to attend a Texas ALP meeting.

Meets Expectations	Exceeds Expectations	Far Exceeds Expectations



**B. COMMENTS BY NOMINATING MEMBER (not to exceed 300 words):**

**NOMINATING MEMBER:**

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Nominating Member's Signature

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Printed Name of Nominating Member

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Local Chapter of Nominating Member

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E-mail Address of Nominating Member



**NOTE:** Before submitting this nomination form, please check it over carefully to be sure it is in conformance with the Texas ALP Official Rules and Regulations. Nominations not conforming with the Official Rules and Regulations will be disqualified.

Nominations must be submitted by the nominating member. Please submit an original to the Awards Chairman.

Nominations must be hand delivered or emailed to the Awards Chairman no later than September 15, 2009 or postmarked by the United States Postal Service on or before September 15, 2009 or validated by an overnight delivery service that such parcel was placed in such service's depository on or before September 15, 2009 and received by the Awards Chairman on or before September 18, 2009. An email confirming receipt of your nomination will be sent to you upon receipt of the nomination form. If you do not receive an email confirmation by September 20, 2009, it is the Nominating Member's responsibility to contact the Awards Chairman to make certain the nomination was timely received. The Awards Chairman will eliminate any material received after the applicable deadline.

No testimonial or other supporting documents will be considered.

**DEADLINE: SEPTEMBER 15, 2009**

**RETURN COMPLETED NOMINATION FORM TO:**

Cynthia Barrett, PP, PLS, TSC-CL  
Texas ALP Awards Chairman  
16615 North Meadow Dr.  
Houston, TX. 77073  
281.443.0506  
[cellisbarrett@yahoo.com](mailto:cellisbarrett@yahoo.com)



TEXAS ASSOCIATION OF LEGAL PROFESSIONALS  
STRATEGIC PLANNING COMMITTEE

NEEDS YOU TO

**THINK BIG**

IN KEEPING WITH NALS' **THINK BIG** CAMPAIGN TO GET INVOLVED  
AND HELP CHANGE YOUR ASSOCIATION, PLEASE PLAN TO ATTEND  
THE STRATEGIC PLANNING COMMITTEE'S ROUNDTABLE DISCUSSION  
ON VISION STATEMENTS AND REVISIONS TO THE STRATEGIC PLAN

TEXAS ALP FALL EDUCATIONAL CONFERENCE

FRIDAY, OCTOBER 2, 2009

LAST HALF OF COMMITTEE MEETING SESSION

10:30 am-11:30 am

