



# The Texas Docket

[www.texasalp.org](http://www.texasalp.org)

July 2024  
Volume 22, Issue 1

## *“Dazzled Determination”*



2024-2025 Texas ALP Officers

Donna K. Dendy, Laura DeLeon,  
Emily Folsom, Jerri Locknane, and  
Theresa Ann Alba

*Congratulations!*



TALP Legal Professional of the Year  
Sylvia Juarez



*Congratulations!*

**Editor**

Lola J. Smith-Gentry, ACP  
lgentry@hkwwlaw.com

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Materials in *The Texas Docket* are for general informational purposes only; they are not intended to, and do not, constitute legal advice. For specific legal advice, readers are encouraged to consult with counsel of their choice.

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# *The Texas Docket*

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## PRESIDENT'S MESSAGE

To say that I am honored does not even begin to describe the feelings I have to serve as your President this year. Determination has always been a characteristic that I was encouraged to have ever since I was young. Even now I urge my daughter to have determination in everything that she does.



Being a part of this Association allows us the opportunity to continue to prove ourselves through education and networking. It also pushes and encourages us to continue to be the best we can be. When I first became involved with this Association, like most of us it was my local chapter that I had the most contact with. I recall looking at some of Waco's leaders and thinking "Wow! Look at these amazing ladies in our profession." Then I got to know them and they encouraged me to get more involved locally. I did and loved it. But most of you know, or have at least heard of, these Waco

leaders, and they did not stop there. They pushed me to get more involved in the State level as a committee chair. I was anxious when I started that but I was determined to not let these ladies down and to prove that I could do it. Then I was determined to keep improving this Association so I began serving on the EC. Serving as your President this year, I am determined not to let myself, the Waco members, any of you, or this Association down.

You have heard that my theme is Dazzled Determination. When I think of the word dazzle I think of diamonds. In order for a diamond to form it has to have intense heat and pressure. Well we live in Texas, so I would say that we have the intense heat aspect covered. In the legal field there is always pressure, whether it be from clients, deadlines, opposing parties, demanding workloads, or your attorneys/co-workers. Therefore, since we have heat and pressure we can be diamonds, but in order to dazzle you also have to have light. We should shine our light on each other so that our dazzling determination will show to others in this Association and those outside of it as well.

In conclusion, I would like to thank all those who have helped, encouraged, and supported me in getting here today. I always thank God for my abilities. But there is no way I could do what I do without my family, especially Dale and Jesslyn, and my work family who encourage me to do all these things. I would like to thank all the Waco leaders and members who encouraged me to "let my light shine" by getting involved. Thank you to all of you for having confidence in me. I will always strive to do my best for this Association and not to let any of you down. I am determined to make this a great year and to make this Association dazzle.

*Laura DeLeon*

President 2024-2025



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## OUTSIDER LOOKING IN

By: Emily Folsom, 2024-2025 TALP Secretary

Hello all!!! Want to know what it is like going to your FIRST EC retreat? Well good news, I am here to tell you.

First off, I am beyond lucky to be working with the amazing ladies on the EC. The light from the diamonds that they are continues to guide me forward.

I am not going to lie...it was very intimidating and overwhelming to see all the moving parts and ebb and flow of the topics. As the meeting went on, I found that the best way to get involved was to step up and step in.

The EC worked very hard on ensuring that our members (diamonds) were going to be polished and shaped for the year to come.

I had so much guidance and patience from the ladies. Not only did we work hard, but we played hard. We enjoyed getting to know one another on a personal level. I felt like I could go on vacation with all the people there.

Lastly, I want to thank Mr. and Mrs. Dendy for sharing their beautiful Dendy ranch with us.

This is a great start to the EC! I cannot wait to see where we are guided and the knowledge I am going to gain.





*Keep Smiling—Change Happens*



**E-MAIL? CELL PHONE? EMPLOYER? ADDRESS?**

**KEEP IN TOUCH**

**For TALP, Notify:**

Helene L. Wood, PP, PLS, TSC-RE

Communications Chair

713-651-3713 • [helene.wood@nortonrosefulbright.com](mailto:helene.wood@nortonrosefulbright.com)

**(Don't forget to update your NALS profile, too!)**



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"Ok, he broke a few laws. But you know there are literally thousands of laws he completely and totally abided by."



"OK, so asking for forgiveness instead of permission doesn't really apply to embezzlement."



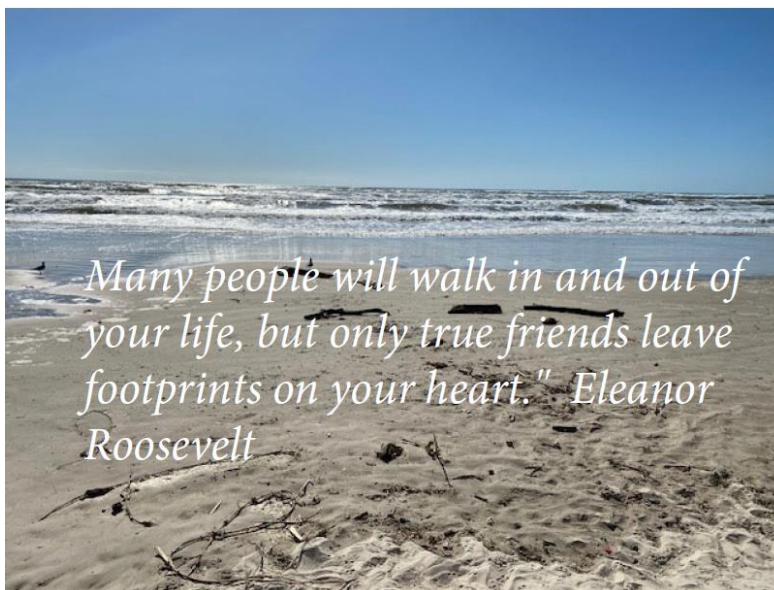
# *A message from TALP Hugs Chair*

*Tina Hurley, PP, PLS (Dallas ALP)*

*It's been a rough couple of months for our Texas ALP family. We lost two Past Presidents in the same week in April: Beth Walker (NALS of Amarillo) and Cheryl Wenzel (SALSA). It's never easy to lose friends and mentors, but both of these women were extremely dedicated to the association and freely shared their knowledge and love of the association. Their legacy will be remembered for years to come.*

*As always, please feel free to reach out to me if you need a "virtual hug" or someone to just listen. As part of the TALP family, we are here to support each other in times of need.*

*I'll be there for you. Blessings and prayers for each and every one of you.*



# Remembering

Cheryl Ann (Pelletier) Wenzel, PP, PLS  
Texas ALP President (2012-2013)

By Mary H. Bullard, ACP Retired



*TALP Officers 2012-13 (l to r: Mary Bullard, Marty Olson, Cheryl Wenzel, Samantha Tandy, Patti Heaney)*

On April 20, 2024, Cheryl Wenzel suddenly passed away at the age of 63. The news of her passing was met with disbelief. It was especially shocking because just two weeks earlier, we had all been with Cheryl at the Texas ALP Annual Education Conference in Waco.

Cheryl was president of Texas ALP for the year 2012-2013, taking her oath of office on Cinco de Mayo 2012 in San Antonio. Cheryl's theme was "Education: One Room Schoolhouse to NALS Certification—How Far We Have Come" and one of the activities for the year was a tour of the one-room schoolhouses of Gillespie County open to both members and their guests.

Cheryl may have been born in Rhode Island but she wholeheartedly embraced everything Texas. The photograph above is of Cheryl and the other members of the EC celebrating her installation at Enchanted Springs Ranch. The other members of that EC—Patti Heaney, Samantha Tandy, Marty Olson, and Mary Bullard—would become the next four presidents of the association and were influenced by Cheryl's leadership.

Cheryl was hard-working, honest, organized, loyal, wise, and kind—especially kind. As her parliamentarian, I was amazed because she never waited until the last minute to do anything. Instead, she began drafting documents months in advance. As an EC, we were especially fortunate because Cheryl believed it was important that everything was shared, so we were literally all on the same page. I will especially miss Cheryl's laughter. She found joy in so many things, whether baking pies for her church, crocheting afghans to raise money for animal shelters, or adopting more cats. She was a true servant.

Cheryl is gone too soon, but she left her imprint on the hearts of the members of Texas ALP and her local chapter, San Antonio LSA, for which she was the longest-serving president.

# Professional Ethics and the Paralegal<sup>1</sup>

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Peter K. Rusek, Esq. (with permission)

*A series of articles will be published in The Texas Docket throughout this fiscal year. This is the first of the series containing ethical information for the legal professional.*

## Historical Overview

On October 23, 1981, the State Bar of Texas became the first bar association in the United States to create a separate division for paralegals. One of the first actions taken by the Board of Directors of the Legal Assistants Division (as it was then known) was to adopt a Code of Ethics and Professional Responsibility (the “Code”). The action was ratified by the members at the first Annual Meeting in June 1982. Each applicant for membership agrees to be bound by the Code of Ethics and the Disciplinary Procedures adopted by the Division. Under said agreement, each paralegal is obligated to maintain and perpetuate the highest professional and ethical standards.

## Definition of a Paralegal

In 2005, the State Bar of Texas Board of Directors, and the Paralegal Division of the State Bar of Texas, adopted a new definition for “Paralegal” which is:

*A paralegal is a person, qualified through various combinations of education, training, or work experience, who is employed or engaged by a lawyer, law office, governmental agency, or other entity in a capacity of function which involves the performance, under the ultimate direction and supervision of a licensed attorney, of **specifically delegated substantive legal work**, which work, for the most part, requires a sufficient knowledge of legal principles and procedures that, absent such a person, an attorney would be required to perform the task. (Emphasis added).*

That definition of a Paralegal was expanded in Paralegal Standards adopted by the State Bar of Texas in 2006. These Standards can be reviewed at <https://txpd.org/about-pages/texas-paralegal-definition-and-standards/>.

So, what is “substantive legal work?” According to the Standards:

*“Substantive legal work” includes, but is not limited to, the following: conducting client interviews and maintaining general contact with the client; locating and interviewing witnesses; conducting investigations and statistical and documentary research; drafting documents, correspondence, and pleadings; summarizing depositions, interrogatories, and testimony; and attending executions of wills, real estate closings, depositions, court or administrative hearings, and trials with an*

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<sup>1</sup> Portions from <https://txpd.org/>

attorney. “Substantive legal work” does not include clerical or administrative work.<sup>2</sup>

## Code of Ethics and Professional Responsibility

### Preamble

Fundamental to the success of any professional organization are the integrity of its members and a high standard of conduct. A Code of Ethics and Professional Responsibility has been promulgated by the Paralegal Division of the State Bar of Texas (adopted March 27, 1982, and amended June 23, 2005).

The canons are intended as a general guide, and the enumeration of the canons does not exclude others of equal importance although not specifically mentioned. The current version of the canons is as follows:

*Canon 1. A paralegal shall not engage in the practice of law as defined by statutes or court decisions, including but not limited to accepting cases or clients, setting fees, giving legal advice, or appearing in a representative capacity in court or before an administrative or regulatory agency (unless otherwise authorized by statute, court or agency rules); the paralegal shall assist in preventing the unauthorized practice of law.*

*Canon 2. A paralegal shall not perform any of the duties that attorneys only may perform or do things which attorneys themselves may not do.*

*Canon 3. A paralegal shall exercise care in using independent professional judgment and in determining the extent to which a client may be assisted without the presence of any attorney and shall not act in matters involving professional legal judgment.*

*Canon 4. A paralegal shall preserve and protect the confidences and secrets of a client.*

*Canon 5. A paralegal shall not solicit legal business on behalf of an attorney.*

*Canon 6. A paralegal shall not engage in performing paralegal functions other than under the direct supervision of an attorney and shall not advertise or contract with members of the general public for the performance of paralegal functions.*

*Canon 7. A paralegal shall avoid, if at all possible, any interest or association which constitutes a conflict of interest pertaining to a client matter and shall inform the supervising attorney of the existence of any possible conflict.*

---

<sup>2</sup> And that distinction can be important for billing and fee recovery purposes: a court may refuse to provide recovery of paralegal time for such non-substantive work. *Gill Sav. Ass'n v. Int'l Supply Co., Inc.*, 759 S.W.2d 697, 705 (Tex. App. Dallas 1988, writ denied).

*Canon 8. A paralegal shall maintain a high standard of ethical conduct and shall contribute to the integrity of the paralegal profession.*

*Canon 9. A paralegal shall maintain a high degree of competency to better assist the legal profession in fulfilling its duty to provide quality legal services to the public.*

*Canon 10. A paralegal shall do all other things incidental, necessary, or expedient to enhance professional responsibility and the participation of paralegals in the administration of justice and public service in cooperation with the legal profession.*

## **Professional Ethics Committee**

The Professional Ethics Committee is responsible for interpreting the Division’s Code of Ethics and Professional Responsibility, serving as a Grievance Committee, and providing the membership with education on ethical issues. This committee is comprised of a Chairperson and, with the Board of Director’s approval, district ad hoc committee members. The Chair and ad hoc committee members are charged with the responsibility of investigating any complaint received against a member of the Division pursuant to the Disciplinary Procedures.

## ***Paralegal Ethics Handbook***

Authored by the Paralegal Division and published by West, the *Paralegal Ethics Handbook* is a resource for new and experienced paralegals. It includes general ethics information and resources as well as ethics information for specific areas of law. The Handbook can be purchased online via the ThomsonReuters.com website: <https://store.legal.thomsonreuters.com/law-products/Practice-Materials/The-Paralegal-Ethics-Handbook-2023-ed/p/106942727> .

Frequently Asked Questions (FAQs) can also be found on the Paralegal Division website at: <https://txpd.org/faqs/?wpv-faq-category=ethics-faqs>. The FAQs answer many questions regarding the ethical conduct performed by paralegals in the State of Texas.

Peter K. Rusek is a shareholder in the firm of Sheehy, Lovelace & Mayfield, PC, having started his legal career there as a clerk while still in law school. He has been licensed to practice law in Texas since 1985. Pete practices across a number of different areas, including legal advice and representation to governmental entities and nonprofits (school districts, community colleges, housing authorities, appraisal districts, etc.), civil litigation (*not* personal injury or family law!) and labor and employment law, just to name a few. He is totally incompetent in the criminal law arena—by choice! A firm believer in the importance of public education, he has served on the Board of Trustees of the Midway Independent School District since 1996 and as Board President since 2004. Pete graduated with a Bachelor in Science with highest honors from Texas A & M University in 1981 and with a J.D. with honors from Baylor Law School in 1984. He has served as an Adjunct Professor at Baylor Law School and at McLennan Community College.

**TEXAS ASSOCIATION OF LEGAL PROFESSIONALS**  
**69<sup>TH</sup> ANNUAL EDUCATION CONFERENCE**  
**APRIL 5-6, 2024**

Waco LPA was pleased to host the TALP Annual Education Conference. Fun, networking, and memories were had by all from the CLE, business meeting, and an 80's party to a Great Gatsby banquet. Special thanks to our speakers:

Peter Rusek, Esq.  
Texas Ranger Travis Dendy  
David N. Deaconson, Esq.  
Jim Hering, Esq.

Garrett Beach, Esq.  
Carlie Gause, Esq.  
Elizabeth Fraley, Esq.

Professional Development Chair Laura Powers gave a fantastic presentation on "Determination"!

If you were not in attendance, you missed receiving a fabulous program and artistic work by Mary Bullard, ACP Retired!

We especially want to thank those who donated to coffee breaks:

Pakis, Giotes, Burleson & Deaconson, P.C.  
Houston Association of Legal Professionals  
Dallas Association of Legal Professionals  
Faynell Poe  
Helene L. Wood  
San Antonio Legal Professionals Association  
Theresa Ann Alba  
Austin LPA, Inc.  
Corpus Christi Assn. of Legal Professionals  
El Paso Assn. of Legal Professionals  
Lubbock Legal Professionals Association

We also appreciate our vendors:

Laura Powers – Mary Kay  
Central Texas Litigation Support Services, Inc.  
NAEGELI Deposition & Trial

The charity that Waco LPA supported was the 100 Club of Heart of Texas. Through your donations and the donation of Texas ALP, over \$600 was sent to this Charity. Thanks to all who donated.

THAT'S A WRAP!

Donna K. Dendy, PP, CLP  
Emily Folsom  
Committee Co-Chairs



**Texas Association of Legal Professionals  
2023-2024  
MEMBERSHIP CAMPAIGN RESULTS**

**CHAPTER CAMPAIGN**  
*Membership Growth*

**MEMBER CAMPAIGN**  
*Membership Recruitment*

**1<sup>st</sup> Place**      **Corpus Christi ALP**

**Sharon Heinaman**  
*Corpus Christi ALP*

**2<sup>nd</sup> Place**      **Waco LPA**

**Helene L. Wood,**  
Certified PP, PLS, TSC-RE  
*Houston ALP*

**3<sup>rd</sup> Place**      **San Antonio LSA**

**Emily Folsom**  
*Waco LPA*

***Congratulations to our Texas ALP Membership Campaign Winners!  
...keep following in the footsteps of Texas ALP...***









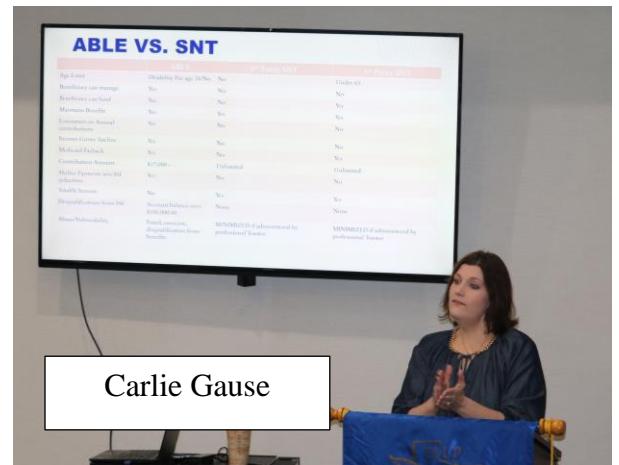
Travis Dendy and Mom



Professor Elizabeth Fraley



Jim Hering



Carlie Gause



Laura Powers and Tracy Powers Whitten





### ***First Timers***

Left to Right: Janalle Silva, Beverly Bishop, Beatrice Dueñez, Krystin Miller, and Brittini Hall



Cynthia Huffman and Barbara Akins



### ***2023-2024 TALP Chairs***



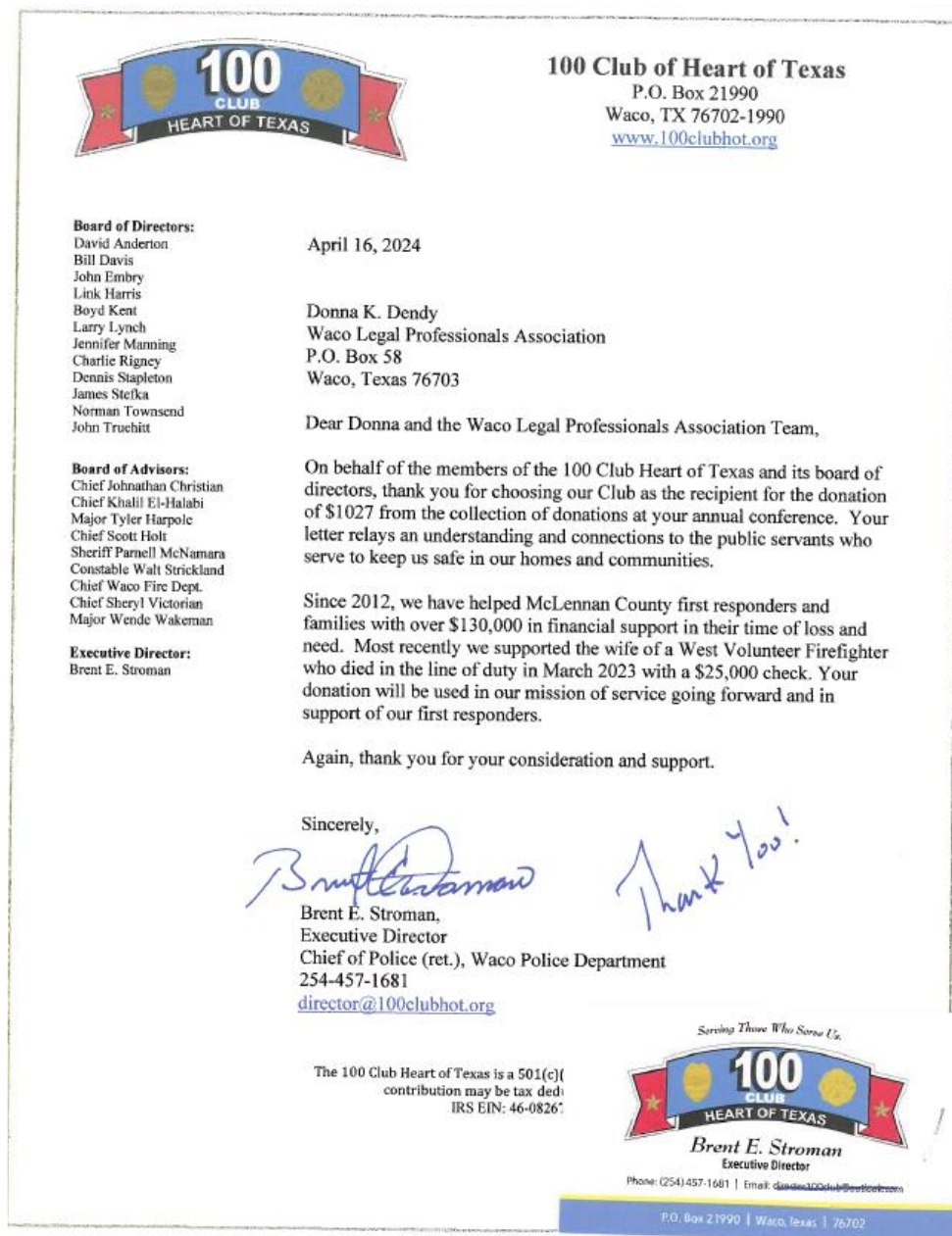


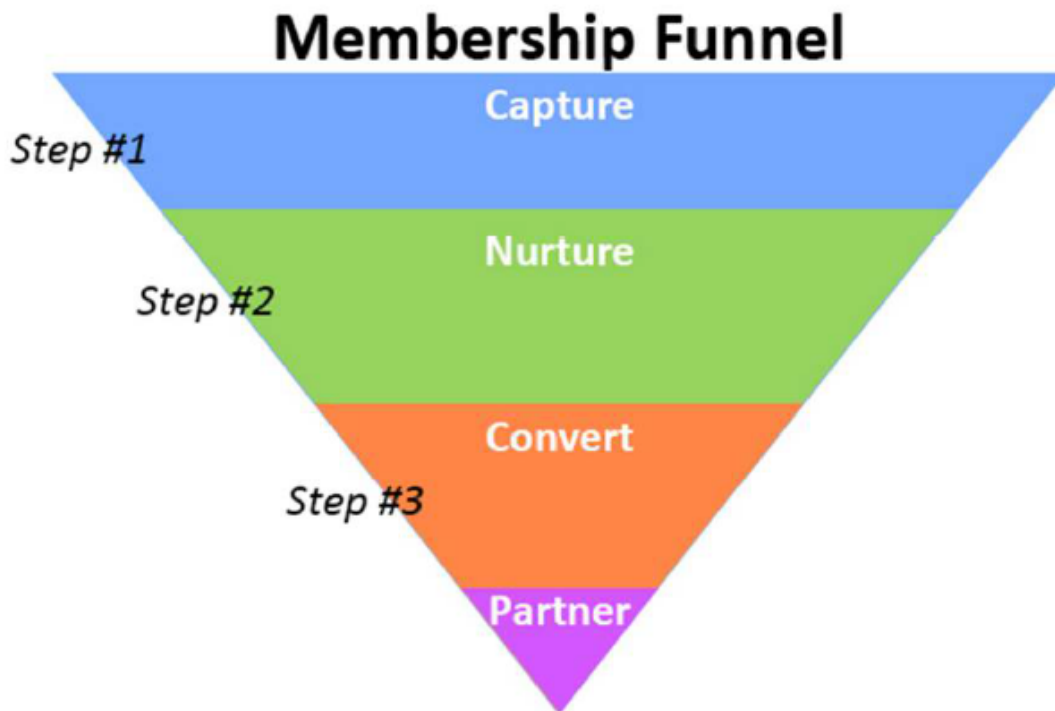
## THANK YOU WACO LPA

I would like to personally thank WacoLPA and its members for a great 2024 Annual Conference. The CLEs were interesting and educational. The social events were so much fun. Personally, it means so much to me to have so many local members supporting me for my induction meeting. I would like to extend a special thank you specifically to Donna Dendy, Emily Folsom, Mary Bullard, and Kristy Turner for their abundance of work, support and encouragement during this conference.

*Laura DeLeon*

President 2024-2025





Here's a breakdown on how the membership funnel creates new members:

- **Step 1: Capture.** Prospective members are “captured” when they’re looped into our organization’s workings, be it by email newsletter, attending an event, or word of mouth.
- **Step 2: Nurture.** Send follow-up emails, mailers, or phone calls nudging prospective new members along the path to signing up. Make prospective members feel appreciated and valued with personalized attention, especially if they’ve shown you interest!
- **Step 3: Conversion.** Offer incentives to signing up, like membership benefits. You might also emphasize key aspects of the membership experience, like networking or community impact.

A membership funnel doesn't end when a person joins NALS. Rather, it goes on, from effective onboarding to providing an exceptional member experience with a goal of creating long-lasting engagement with them.

**Texas Association of Legal Professionals**  
**2024-2025 Membership Campaign**  
May 1, 2024-March 31, 2025  
(Official Tally Sheet Submission Deadline: March 31, 2025)

---

**MEMBER CAMPAIGN**

**2 DIAMONDS**



Each new individual or student member recruited



Each new member reclaimed



Each CLE article obtained for and published in The Texas Docket

**3 BONUS DIAMONDS**



Each individual nominated for LPY

**3 BONUS DIAMONDS**



Each individual serving as a TALP Committee Chair/Member

**5 BONUS DIAMONDS**



Each CLE article written for and published in The Texas Docket



Participation in a mentoring program for members

**20 SUPER BONUS DIAMONDS**



Each new advertiser obtained for The Texas Docket

**CHAPTER CAMPAIGN**

**2 DIAMONDS**



Each new member the chapter or members brings into the Association



Each past member the chapter or member reclaims



Each membership drive held (in person or virtually)

**3 BONUS DIAMONDS**



Each LPY Nominee

**3 BONUS DIAMONDS**



Each individual serving as a TALP Committee Chair/Member

**5 BONUS DIAMONDS**



100% retention of chapter members



Each chapter brag published in The Texas Docket

**20 SUPER BONUS DIAMONDS**



Each new advertiser obtained for The Texas Docket

**PRIZES: 1<sup>st</sup> Place \$75.00**



**2<sup>nd</sup> Place \$50.00**



*Texas Association of Legal Professionals*  
*2024-2025 Membership Campaign*

**Official Rules and Tally Sheet**  
**Reporting Period: May 1, 2024, Through March 31, 2025**  
**Submission Deadline: March 28, 2025**

**RULES**

The **Official Tally Sheet** (below) must be received by e-mail by Membership Chair Dee Martinez ([dmartinez@edwardsfirm.com](mailto:dmartinez@edwardsfirm.com)), By 5:00 p.m. Central on the submission deadline date.

**Eligibility to Participate in Campaign:** All full TALP members (Individual, Retired, Students) are eligible. Members of the TALP Executive Committee and members of the Membership Committee are not eligible.

**Participation:** The reporting member or chapter must submit the Official Tally Sheet to the Membership Chair in order to claim campaign points. The total campaign tally will be certified by the TALP Parliamentarian, who will have the final word on the matter.

**MEMBER CAMPAIGN**

**REPORTING MEMBER:** \_\_\_\_\_

(Space may be increased using Word document)

<b>New Individual or New Student Member Recruited</b>	
Name:	Joined Date:
Name:	Joined Date:
Name:	Joined Date:
<b>Past Member Reclaimed</b>	
Name:	Rejoined Date:
Name:	Rejoined Date:
Name:	Rejoined Date:
<b>Individual Nominated for LPY</b>	
Name:	Date:
<b>CLE Article Obtained</b>	
Title:	Published in Docket Issue No.:
Title:	Published in Docket Issue No.:
<b>CLE Article Written</b>	
Title:	Published in Docket Issue No.:
Title:	Published in Docket Issue No.:
<b>Mentoring Program Participation</b> (examples: being a TALP Pal or mentoring a student participating in a paralegal program)	
Location:	Date:
Location:	Date:
<b>New Docket Advertiser Obtained</b>	
Advertiser:	Published in Docket Issue No.:
Advertiser:	Published in Docket Issue No.:
<b>Serve as a TALP Committee Chair/Member</b>	
Committee:	Position:

*Texas Association of Legal Professionals*  
*2024-2025 Membership Campaign*

**Official Rules and Tally Sheet**  
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**CHAPTER CAMPAIGN**

**REPORTING CHAPTER:** \_\_\_\_\_

(Space may be increased using Word document)

<b>New Individual or New Student Member Recruited</b>	
Name:	Joined Date:
Name:	Joined Date:
Name:	Joined Date:
<b>Past Member Reclaimed</b>	
Name:	Rejoined Date:
Name:	Rejoined Date:
Name:	Rejoined Date:
<b>Membership Drives Held</b>	
Location:	Date:
Location:	Date:
Location:	Date:
<b>Individual Nominated for LPY</b>	
Name:	Date:
<b>Chapter Member Retention</b>	
Official TALP Count on 5/1/2024:	Official TALP Count on 3/31/2025:
<b>Chapter Brags Published</b>	
Title:	Published in Docket Issue No.:
Title:	Published in Docket Issue No.:
Title:	Published in Docket Issue No.:
<b>New Docket Advertiser Obtained</b>	
Advertiser:	Published in Docket Issue No.:
Advertiser:	Published in Docket Issue No.:
<b>Serve as a TALP Committee Chair/Member</b>	
Committee:	Position:

# Welcome, New Members!

*Brenda D. Alaniz*

Corpus Christi ALP | Individual | Joined March 21, 2024

*Sarah Bailey*

Corpus Christi ALP | Individual | Joined March 13, 2024

*Beatrice Duenez*

Lubbock LPA | Individual | March 18, 2024

*Samantha Hans*

Dallas ALP | Individual | March 20, 2024

*Joann Parks*

San Antonio LSA | Individual | April 23, 2024

*Carolyn Weaver*

Waco LPA | Individual | March 28, 2024



*— Dazzled Determination —*

# Happy Birthday!

## July

- 1—Thelma A. Martinez
- 2—Megan Dawes
- 7—Rebecca Farias
- 8—Avis Morris
- 10—Susan E. Moore, PLS
- 12—Amanda Mahaffey
- 17—Gina Simmons, CLP
- 24—Cecilia Ibarra-Martinez
- 24—Diana Martinez
- 25—Chloe Laroche
- 28—Carol R. Gutierrez, PLS
- 29—Gay S. Polk
- 31—Donna K. Dendy, PP, CLP
- 31—Laura Powers, CP

## August

- 2—Clarissa Elias
- 2—Erin-Nicole L. Hacker
- 2—Sonja Robinson
- 3—Theresa Ann Alba, PLS
- 5—Joann Parks
- 5—Helena Rodriguez
- 6—Anjelica Tuttle
- 9—Melanie A. Bolton
- 9—LeAnn D. Shelton
- 13—Lawrence Dike
- 14—C. Susan Eskew, PP, PLS
- 14—Nancy Hurt
- 15—Staci Gaffney
- 15—Frances Lopez

- 15—Elizabeth G. Wells, PP, PLS
- 19—Faynell Poe, PP, PLS
- 21—Ileia Perry
- 21—Stephanie K. Soria
- 22—Kimberly L. Culpepper, PLS, TSC
- 23—Anne Hoover, PP, PLS
- 25—Felisa Frias

## September

- 1—Courtney Alvarez
- 1—Janalle Silva
- 2—Brandi Bassett
- 2—Lisa Cladwell
- 3—Greta B. Duran, CLP
- 4—Dawna Garza
- 5—Cheryl McReynolds
- 10—Lynn Broderick
- 10—Carolyn Weaver
- 11—Jennifer Whitener
- 14—Amber Alexander
- 14—Alice Sheets
- 17—Catarino Alvear Jr.
- 17—Loretta Ybarbo
- 18—Laura DeLeon
- 19—Mary Bullard, ACP Retired
- 19—Gina Martinez
- 20—Lori Betus
- 21—Chelsea Nunes
- 24—Maria Carlson, PLS
- 24—Phillip S. Rodriguez
- 29—Carmen Cindo

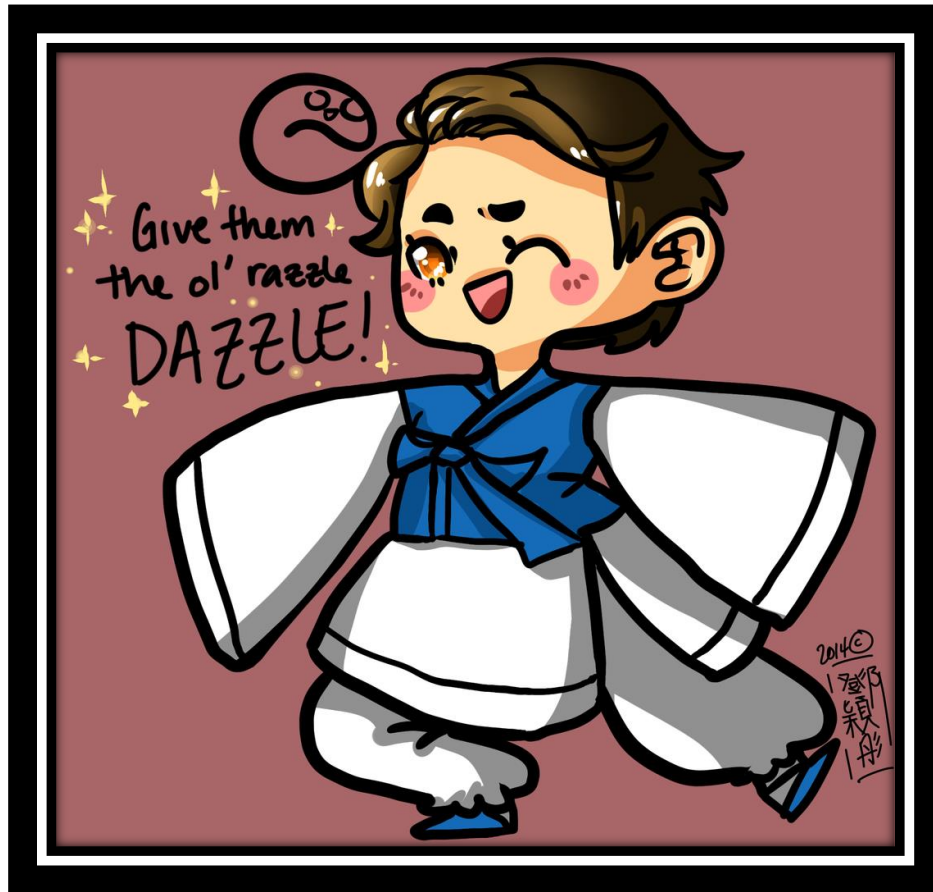


# DAZZLES

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Local Associations**

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***SAVE THE DATES!***  
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**AUSTIN LPA, INC.**

**CHARTERED  
OCTOBER 28, 1960**



**AUSTIN LPA, INC. IS EXCITED TO HOST THE  
TEXAS ALP 70<sup>TH</sup> ANNUAL EDUCATION CONFERENCE  
ON APRIL 4-5, 2025  
AT THE WYNDHAM GARDEN AUSTIN.  
WE ARE LOOKING FORWARD TO SEEING YOU!**

**“HAND IN HAND WE ARE ONE”**



CCALP



*Corpus Christi Association of Legal Professionals*

## Welcoming Our New Board Members and Officers



Corpus Christi ALP is excited to have these highly accomplished ladies join the board.

The theme of **BICYCLE PARTS** was chosen by President Sharon Heinaman for the installation of officers. The officers were presented a gift of a bike spoke bracelet.



# CONGRATULATIONS

from

*Corpus Christi Association of Legal Professionals*



**Sharon Heinaman**  
**2024 Paralegal of the Year**

Sharon currently serves as the President of Corpus Christi ALP. Sharon has been with Porter Rogers Dahlman & Gordon for 18 years and has worked in the legal field for over 27 years.

Words from her boss, Donald L. Jones:  
*"Sharon is the consummate professional, an avocational workplace psychologist of wide repute, a wrangler of unresponsive opposing counsel, a schmoozer of unreasonable court managers and unrelenting slayer of litigation deadlines. And despite giving so much of herself at work, Sharon would never dream of saying no to a friend in need or a young legal professional in seeking a mentor. She is simply the best."*



**Donald L. Jones**  
**2024 Boss of the Year**

Donald L. Jones engages in an active civil litigation practice, representing both plaintiffs and defendants in a variety of practice areas including commercial litigation, construction litigation, real estate litigation and oil and gas litigation with Porter Rogers Dahlman & Gordon.

Words from his paralegal, Sharon:  
*"He is not only my boss but also my good friend and mentor. Mr. Jones treats his team with the upmost respect and encourages us to perform to the best of our abilities. He gives credit when it is due and always thanks his entire team for their hard work and dedication. He is compassionate and understanding when life happens, and personal matters occur."*







***Lubbock Legal Professionals Association***



**2024 Bosses' Night  
Roll the Dice**

Boss of the Year  
Kelli Leisure

Legal Professional of the Year  
Blake Walterscheid



**2024-2025 LLPA Officers**

Angela Gschwend, Beatrice Dueñez, Emily Walterscheid, Sylvia Juarez, Blake Walterscheid, Barb Sucsy, Katrina Smith, and Lola Smith-Gentry



## Waco Legal Professionals Association

Waco Legal Professionals Association was proud to host “Dazzled Determination.” The 69<sup>th</sup> Annual Education Conference April 5-6, 2024 held at the Holiday Inn Express South was attended by Julie A. Abernathy, PP, PLS; Mary H. Bullard, ACP Retired, TSC-RE; Laura DeLeon; Donna K. Dendy, PP, CLP, TSC-RE; Emily Folsom; Kirsten Gibson; Brittni Hall; Olivia W. Johnson, CP, CLP; Janelle Silva; and Carolyn Weaver. Joining us for the President’s Banquet on Saturday evening was past president Kristy C. Turner who also served as a judge for the Legal Professional of the Year.



It was exciting to have had four Texas ALP past presidents from Waco participate in the weekend. Of utmost importance, however, was the fact that Waco now has three officers serving on the Texas ALP Executive Committee: Laura DeLeon (president), Emily Folsom (secretary), and Donna K. Dendy (parliamentarian). Our chapter may be small in number, but we sure can pull off a successful annual conference with Dazzled Determination.

The newly-elected and installed officers for Waco Legal Professionals are:

Kirsten Gibson, President  
Donna K. Dendy, Treasurer  
Brittni Hall, Secretary  
Julie Abernathy, Director

Waco LPA is looking forward to a successful year under the guidance of these dedicated members.



ACCORDING TO GREGG<sup>i</sup>  
By Myra Miles, PLS

**Rule 1061 – Who and Whom**

*Who* is the nominative form. Use *who* whenever *he, she, they, I, or we* could be substituted in the *who* clause. (If in doubt, mentally rearrange the clause as is done in parentheses after each of the following examples.)

Who is arranging the teleconferences? (*She* is arranging the teleconferences.)

Who shall I say *is calling*? (I shall say *he* is calling.)

I will speak to whoever answers the phone. (*He* answers the phone.)

Gloria is the one who can best do the job. (*She* can best do the job.)

*Whom* is the objective form. Use *whom* whenever *him, her, them, me, or us* could be substituted as the object of the verb or as the object of a preposition in the *whom* clause.

Whom did you see today? (You did see *her* today.)

To whom were you talking? (You were talking to *him*.)

Whom were you talking about? (You were talking about *him*.)

**NOTE:** The humorist Calvin Trillin has said, “As far as I’m concerned, *whom* is a word that was invented to make everyone sound like a butler.” In colloquial speech, most people are likely to say, “Who ya gonna vote for?” rather than “Whom are you going to vote for?” But in a business or academic document, be sure to use *whom* when the objective form is called for. If *whom* strikes you as too stilted or sounds unnatural, reword the sentence; for example, “Who is your choice in the next election?”

**Rule 1062 – Who, Which, and That**

*Who* and *that* are used when referring to persons. Select *who* when the individual person or the individuality of a group is meant and *that* when a class or type is meant.

She is the only one of my managers who can speak Japanese fluently.

He is the kind of student that should take advanced math.

*Which* and *that* are used when referring to places, objects, and animals. *Which* is always used to introduce nonessential clauses, and *that* is ordinarily used to introduce essential clauses.

Laura’s report on employee benefits, which I sent you last week, should be of some help. (*Which* introduces nonessential clause; the report has already been identified.)

The report that I sent you last week should be of some help.

(*That* introduces an essential clause; it is needed to identify which report the writer is referring to.)

**NOTE:** *Who* is now often used when an animal is identified by gender or a pet is identified by name.

It was a chocolate Lab named Luke *who* located your missing child.

### Rule 1063 – *Whose* and *Who's*

Do not confuse *whose* (the possessive form of *who*) with *who's* (a contraction meaning “who is” or “who has”).

*Whose* house is it? (It is *his*.) *Who's* the owner of that house? (*She* is.)

*Who's* had the most experience in this position? (*She* has had the most experience...)

*Who's* the most experienced person? (*She* is the most experienced person.)

*Whose* experience is best suited to that position? (*Her* experience is.)

### Rule 1080 – Prepositions at the End of Sentences

Ending a sentence with a preposition is not incorrect. Whether you do so or not should depend on the emphasis and effect you want to achieve.

**INFORMAL:** I wish I knew which magazine her article appeared *in*.

**FORMAL:** I wish I knew *in which* magazine her article appeared.

Trying not to end a sentence with a preposition may lead to very awkward results.

**STILTED:** It is difficult to know *about* what you are thinking.

**NATURAL:** It is difficult to know what you are thinking *about*.

Short questions and statements frequently end with prepositions.

How many can I count *on*?

What is this made *of*?

Where did he come *from*?

You have nothing to worry *about*.

What is this good *for*?

We need tools to work *with*.

That's something we must look *into*.

That's the car I want to look *at*.

Some sentences end with what seem like prepositions but are really adverbs.

I'm sure another job will turn *up*.

When does your plane take *off*?

Sometimes the object of a preposition at the end of a sentence is not expressed.

Although most of our car trips to the West Coast are uneventful, the last one was anything but. (Anything but uneventful.)

Both these examples reinforce the main point:

Use good sense in deciding whether or not to end a sentence with a preposition.

**BETTER THAN:** Use good sense in deciding whether or not to use a preposition to end a sentence with.

## Rule 1086 – Misplaced Modifiers

Watch out for misplaced modifiers (either words or phrases) that provide the basis for unintended (and sometimes humorous) interpretations.

**WRONG:** I suspect that my assistant accidentally dropped the report I had been drafting in the wastebasket. (What an uncomfortable location in which to draft a report.)

**RIGHT:** The report I had been drafting has disappeared. I suspect that my assistant accidentally dropped it in the wastebasket.

**WRONG:** Here are some helpful suggestions for protecting your valuable possessions from our hotel security staff. (Can no one be trusted?)

**RIGHT:** Here are some helpful suggestions from our hotel security staff for protecting your valuable possessions.

**WRONG:** One of our assistant vice presidents has been referred to a personal finance counselor with serious credit problems. (Would you consult such a counselor?)

**RIGHT:** One of our assistant vice presidents has serious credit problems and has been referred to a personal finance counselor.

**WRONG:** For anyone who has children and does not know it, there is a free after-school program at the Marshfield Community Center.

**RIGHT:** Anyone with children will be glad to know that there is a free after-school program at the Marshfield Community Center.

**WRONG:** Lincoln wrote the Gettysburg Address while traveling to Gettysburg on the back of an envelope.

**RIGHT:** While traveling to Gettysburg, Lincoln wrote the Gettysburg Address on the back of an envelope.

Always remember: When in doubt, check it out.

<sup>1</sup> William A. Sabin, *The Gregg Reference Manual: A Manual of Style, Grammar, Usage, and Formatting*, Tribute ed., 11th ed., McGraw-Hill, New York, 2011.



# NALS FOUNDER'S CHALLENGE!

The NALS Foundation is challenging you to celebrate the 95th anniversary of NALS!

**Members:** Donate \$.95 for every year that you have been a NALS member.

**Local and State Chapters:** Donate \$.95 for every year since the chapter was chartered.

Find more information on the [NALS Foundation Conference Page!](#)



The Texas ALP Executive Committee has signed up to be part of the NALS Foundation Decades Competition and we have chosen the 80's decade. For those Texas ALP members attending, we would love for you to bring your best 80's attire and join the fun. To all Texas ALP members, we need your help to show other NALS members what Texas ALP is all about. Please go to the following NALS fundraising page to show your support:

[https://link.edgepilot.com/s/39a2309c/pAk4LrTQEyK8S\\_6yeIWyG?u=https://www.nals.org/donations/fund.asp?id=23919](https://link.edgepilot.com/s/39a2309c/pAk4LrTQEyK8S_6yeIWyG?u=https://www.nals.org/donations/fund.asp?id=23919)

We hope to see you, our members, in Portland. Early registration for the NALS 2024 National Legal Education Conference is now open. Those who register early will receive the best pricing. To register and for more information, please go to [nals.org](https://www.nals.org).



# *The Texas Docket*

## **Advertising Rates**

*The Texas Docket* is the official publication of the Texas Association of Legal Professionals and is published quarterly each year as a service to the legal profession. Publication dates are July 1, October 1, January 1, and April 1, with submission deadlines being May 1, August 1, November 1, and February 1. *The Texas Docket* is distributed electronically to its statewide network of members, subscribers, and others. Vendors who work in the legal field are welcome and encouraged to advertise in *The Texas Docket*.

<u>Ad Options</u>	<u>Ad Rates</u>	
Full page (9" h x 7" w)	<u>Annual</u>	<u>One Issue</u>
Half Page Horizontal (4.5" h x 7" w)	Full = \$100	Full = \$50
Quarter Page Vertical (4.5" h x 3.25" w)	Half = \$75	Half = \$35
	Quarter = \$50	Quarter = \$20

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_____ Billing Address	_____ Signature	_____ Date
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**Send order form, camera-ready advertisement, and payment to:**

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*Your advertisement can be e-mailed in a graphic format to [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com).*

**For more information, contact:**

Lola Smith-Gentry, ACP  
806.632.7464 • [lgentry@hkwwlaw.com](mailto:lgentry@hkwwlaw.com)



**TEXAS ALP 2024 FALL BOARD MEETING AND EDUCATIONAL CONFERENCE**  
(VIRTUAL) Lubbock, Texas – September 20-21, 2024  
REGISTRATION DEADLINE – September 6, 2024

**REGISTRATION FORM**

Name \_\_\_\_\_

Address \_\_\_\_\_

City/State/ZIP \_\_\_\_\_

Daytime Phone \_\_\_\_\_

E-mail \_\_\_\_\_

**Certifications**

- |                              |                              |                                     |
|------------------------------|------------------------------|-------------------------------------|
| <input type="checkbox"/> ALS | <input type="checkbox"/> PLS | <input type="checkbox"/> PP         |
| <input type="checkbox"/> CLA | <input type="checkbox"/> CP  | <input type="checkbox"/> CLAS / ACP |
| <input type="checkbox"/> TSC | <input type="checkbox"/> RP  | <input type="checkbox"/> Other      |

Local Chapter \_\_\_\_\_

Current Texas ALP Position Held \_\_\_\_\_

Current Local Position Held \_\_\_\_\_

- NALS Life Member
- Texas ALP Past President
- This is my first Texas ALP meeting

**SCHEDULE OF EVENTS**

**Mark Each Event You Will Attend**

**Friday, September 20, 2024**

- |  |                          |
|--|--------------------------|
| <input type="checkbox"/> 4:00 p.m. – 5:00 p.m. | Professional Development |
| <input type="checkbox"/> 5:00 p.m. – 5:30 p.m. | Open Forum               |
| <input type="checkbox"/> 5:30 p.m. – 5:45 p.m. | Credential               |
| <input type="checkbox"/> 5:45 p.m. – 7:30 p.m. | Business Meeting         |

**Saturday, September 21, 2024**

- |  |                         |
|--|-------------------------|
| <input type="checkbox"/> 9:00 a.m. – 10:00 a.m.  | <i>Business Law</i>     |
| <input type="checkbox"/> 10:05 a.m. – 11:05 a.m. | <i>Family Law</i>       |
| <input type="checkbox"/> 11:10 a.m. – 12:10 p.m. | <i>Criminal Law</i>     |
| <input type="checkbox"/> 12:15 p.m. – 1:15 p.m.  | <i>Ethics</i>           |
| <input type="checkbox"/> 1:20 p.m. – 2:20 p.m.   | <i>Civil Litigation</i> |

**FULL REGISTRATION FEES**

- Texas ALP Member.....\$75.00
- Texas ALP Chair\*.....\$25.00
- Nonmember.....\$100.00
- Student.....\$50.00

**INDIVIDUAL EVENT REGISTRATION FEES**

- Education Only - Member.....\$75.00
- Education Only - Nonmember.....\$100.00
- Education Only - Student.....\$50.00
- Business Session Only – Member or Nonmember.....\$0.00

\*\$50.00 to be paid by Texas ALP

Total Amount Due: \$\_\_\_\_\_ (due with registration form)

Please make check payable to:  
**Lubbock LPA Special Meeting Account**  
Federal Tax ID No.: 75-6044048

**Notice:** A \$25 fee will be assessed for returned checks. Refunds requested and confirmed in writing (less a \$25 fee) will be made until September 6, 2024.

**Meeting Chair:**  
Emily Walterscheid, PP, CLP

**Mail Registration Form to:**  
Emily Walterscheid  
1101 Broadway  
Lubbock, TX 79401  
(806) 782-8927  
[Emily@Matthewharrislaw.com](mailto:Emily@Matthewharrislaw.com)

*Contributions or gifts to the Texas Association of Legal Professionals are not deductible as charitable contributions for federal income tax purposes.*

**TEXAS ALP 2024  
FALL BOARD MEETING AND  
EDUCATIONAL CONFERENCE  
(VIRTUAL) Lubbock, Texas  
September 20-21, 2024**

SCHEDULE OF EVENTS

FRIDAY, SEPTEMBER 20, 2024

4:00 PM – 5:00 PM	PROFESSIONAL DEVELOPMENT
5:00 PM – 5:30 PM	OPEN FORUM
5:30 PM – 5:45 PM	CREDENTIALS
5:45 PM – 7:30 PM	TEXAS ALP ANNUAL MEETING

SATURDAY, SEPTEMBER 21, 2024

9:00 AM – 10:00 AM	CLE – BUSINESS LAW
10:05 AM – 11:05 AM	CLE – FAMILY LAW
11:10 AM – 12:10 PM	CLE - CRIMINAL LAW
12:15 PM – 1:15 PM	CLE – ETHICS
1:20 P.M. – 2:20 P.M.	CLE - CIVIL LITIGATION



# TEXAS ALP *2023-2024* ROSTER OF OFFICERS AND CHAIRS

*Chartered July 27, 1956*



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## Executive Committee

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<b>PRESIDENT</b>	Laura DeLeon (Waco LPA)
<b>PRESIDENT-ELECT</b>	Theresa Ann Alba, PLS (Austin LPA)
<b>TREASURER</b>	Jerri Locknane, CLP (Lubbock LPA)
<b>SECRETARY</b>	Emily Folsom (Waco LPA)
<b>PARLIAMENTARIAN</b>	Donna K. Dendy, PP, CLP, TSC-RE (Waco LPA)

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## Standing Committees

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<b>ANNUAL CONFERENCE</b>	Patricia Nuhn, PLS (Austin LSA)
<b>AWARDS</b>	Sharon Heinaman (Corpus Christi ALP)
<b>BYLAWS/STANDING RULES</b>	Patricia Nuhn, PLS (Austin LPA)
<b>CERTIFICATION</b>	Marty S. Olson, PP, P)LS, TSC-RE (Houston ALP)
<b>COMMUNICATIONS</b>	Helene L. Wood, PP, PLS, TSC-RE (Houston ALP)
<b>EDUCATION</b>	Andrea D. Griffin, P)P, PLS (Member at Large)
<b>FALL EDUCATION CONFERENCE</b>	Emily D. Walterscheid, PP, CLP (Lubbock LPA)
<b>FINANCIAL REVIEW</b>	Olivia W. Johnson, PLS, CP (Waco LPA)
<b>FUNDRAISING</b>	Kristin J. Gibson (Waco LPA)
<b>MARKETING</b>	Diana (Dee) Martinez (Corpus Christi ALP)
<b>MEETINGS COORDINATOR</b>	Diane M. Stanley, RP (Houston ALP)
<b>MEMBERSHIP</b>	Diana (Dee) Martinez (Corpus Christi ALP)
<b>NOMINATIONS &amp; ELECTIONS</b>	Michelle M. Silvas (Corpus Christi ALP)
<b>PLANNING</b>	Julie A. Abernathy, PP, PLS (Waco LPA)
<b>PROFESSIONAL DEVELOPMENT</b>	Marty S. Olson, PP, P)LS, TSC-RE (Houston ALP)
<b>THE TEXAS DOCKET</b>	Lola J. Smith-Gentry, ACP (Lubbock LPA)
<b>WEBMASTER</b>	Emily D. Walterscheid, PP, CLP (Lubbock LPA)

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## Special Committee

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<b>TALP HUGS</b>	Tina D. Hurley, PP, CLP (Dallas ALP)
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