



2021 ANNUAL REPORT

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Supporting
Paralegals in their
Career Journey
for 47 Years

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To Our Members

VISION STATEMENT

The preeminent resource for personal and professional success.

MISSION STATEMENT

Advancing paralegals through certification and professional development.

STRATEGIC HIGHLIGHTS

NALA's Board of Directors evaluates the changing landscape for paralegals to ensure that we continue to be the leader for the paralegal profession. We monitor the industry closely for external factors and influences so that we are adequately prepared for change. Throughout 2021, we updated and continued to implement the strategic plan developed by the Board of Directors in the fall of 2018. The strategic plan includes these five key areas:



FINANCIAL HIGHLIGHTS

Although 2021 included some unique challenges for the association and its members due to the Covid-19 pandemic, NALA ended 2021 with an increase in net assets of \$123,754.

OPERATING HIGHLIGHTS

NALA's staff continued to focus on supporting members as the COVID-19 pandemic continued through 2021. The conference was presented in a completely virtual format for the second year in a row, and virtual Town Halls for Affiliated Associations and virtual Panel Discussions for educators and students were added to ensure that connections and collaborations continued when in-person meetings could not be conducted. In 2021, new affinity partners were added; a new ACP course was developed; and the Diversity, Equity, and Inclusion Task Force was codified as a new standing committee of the Board of Directors. Additionally, the NALA website was completely redesigned to provide a more intuitive user experience; milestone member pins were unveiled; and work began to add a remote proctoring option for CP examinees.

Melissa J. Hamilton, ACP
NALA Board President

Vanessa Finley, MBA, CAE
CEO

About NALA

The National Association of Legal Assistants (NALA) is the leading paralegal association in the U.S. Its mission is to provide continuing education and professional development to all paralegals. NALA provides current information about the profession, continuing education programs (publications, courses, and webinars), networking opportunities, professional certification programs, and occupational survey reports to help paralegals excel in the workplace. NALA is a non-profit organization, 501(c)(6), representing more than 15,000 individual paralegals, who are members, members of NALA affiliated associations, and/or are Certified Paralegals.

NALA is a membership organization. This means that the individual members of NALA are the leading force of NALA programs and policies. Through NALA, paralegals across the nation have come together to develop programs and standard setting codes to help them grow in the workplace. The association is governed by a Board of Directors and maintains an office and staff in Tulsa, Oklahoma.

NALA is a trade name (filed in Oklahoma in 2003) for The National Association of Legal Assistants which was formed on April 10, 1975, in Oklahoma.

You can find NALA online at:

- [Facebook](#)
 - [CP Exam Review Study Group](#)
- [LinkedIn](#)
- [Twitter](#) - @NALA_Paralegals



NALA Presidents



Jane Terhune, *ACP*
Tulsa, OK
1975-1977



Dorthea Jorde, *ACP*
Minot, ND
1977-1979



Janis Davidson, *CP*
Birmingham, AL
1979-1980



Signa Treat
Seattle, WA
1980-1982



Robert F. Farrell, *CP*
Norfolk, VA
1982-1984



Kay Kasic, *CP*
NAPA, CA
1984-1986



Karen Sanders-West,
JD, ACP
Wichita, KS
1986-1988



Karen B. Judd, *CP*
Champaign, IL
1988-1990



Connie Kretchmer, *ACP*
Omaha, NE
1990-1992



Karen M. Dunn, *ACP*
Avon, CO
1992-1994



Pamela J. Bailey, *ACP*
Pittsburgh, PA
1994-1996



Amy J. Hill, *ACP*
Raleigh, NC
1996-1997



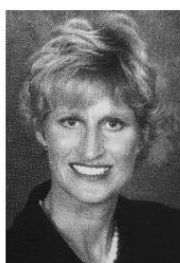
Brenda Allensworth
Mientka, *ACP*
Colorado Springs, CO
1997-1998



Vicki Voisin, *ACP*
Charlevoix, MI
1998-2000



Patricia G. Elliott, *ACP*
Phoenix, AZ
2000-2002



Vicki J. Kunz, *ACP*
Bismarck, ND
2002-2004



Debra J. Smith, *ACP*
Bloomington, IL
2004-2006



Tita A. Brewster, *ACP*
Las Cruces, NM
2006-2008



Linda J. Wolf, *ACP*
Dallas, TX
2008-2010



Karen Greer McGee, *ACP*
Shreveport, LA
2010-2012



Ann L. Atkinson, *ACP*
Omaha, NE
2012-2014



Kelly A. LaGrave, *ACP*
Lansing, MI
2014-2016



Cassandra Oliver-Divens, *ACP*
Tulsa, OK
2016-2018



Jill I. Francisco, *ACP*
Huntington, WV
2018-2020

Membership

NALA's membership is made up of several classification types. The chart below illustrates the total number of members at the end of each fiscal year. Following a decline in 2020, NALA's membership rebounded slightly in 2021. The retention rate for 2021 was 65%, and the national average was 76%.

Membership Categories:

- Active
- Associate
- Student
- Organization
- Sustaining
- Honorary

Active Membership is open to individuals who meet at least one of the following qualifications:

- Successfully completed NALA's Certified Paralegal Exam
- Graduated from an ABA-approved paralegal program
- Graduated from an institutionally accredited program with not less than the equivalent of 60 semester hours of classroom study
- Graduated from a paralegal program not listed above, but has no less than six months of in-house training as a paralegal, whose attorney-employer attests that such person is a qualified paralegal
- Holds a baccalaureate degree in any field, plus not less than six months of in-house training as a paralegal, whose attorney-employer attests that such person is a qualified paralegal
- Minimum of three years of law-related experience under the supervision of an attorney, including at least six months of in-house training as a paralegal, whose attorney-employer attests that such person is qualified as a paralegal
- Minimum of two years of in-house training as a paralegal, whose attorney-employer attests that such person is a qualified paralegal

Associate Membership is open to individuals who meet at least one of the following qualifications:

- Member of bar association endorsing the paralegal concept or involved in the promotion of the paralegal profession
- Individual involved in the educational field who endorses the paralegal concept or is involved in the promotion of the paralegal profession
- Supervisor of paralegals

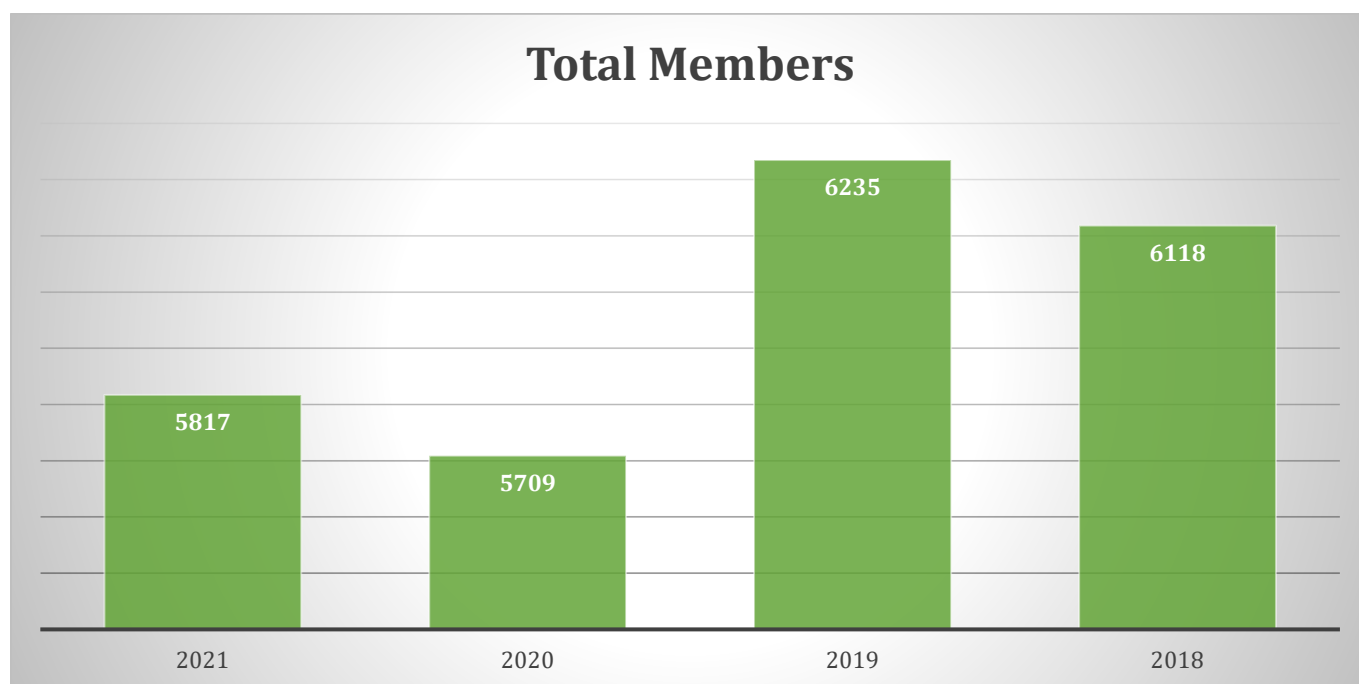
Student Membership is open to individuals who meet at least one of the following qualifications:

- Full-time student in good standing pursuing a course of study as a paralegal
- A full-time student is defined as a student taking a minimum of 12 semester hours or who is taking all of the paralegal courses the schedule permits, provided the individual is not employed as a paralegal

Organization Membership allows companies to offer all the benefits of NALA to each of the paralegals on their staff for just ONE FLAT RATE. With several different staff sizing options available, you can select the best fit for your entire organization. The staff members who are members under an organization membership are Active type members.

Sustaining Membership is open to individuals, law firms, corporations, and paralegal program representatives who endorse the paralegal concept or are actively involved in the promotion of the paralegal profession.

Honorary Membership is given to members who have been an Active type member for 25 consecutive years.



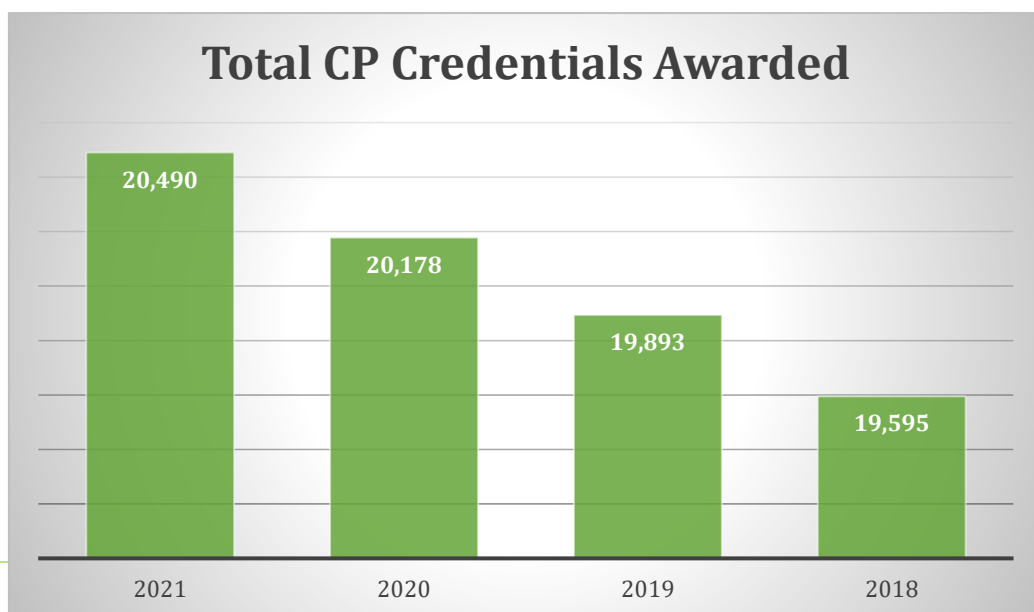
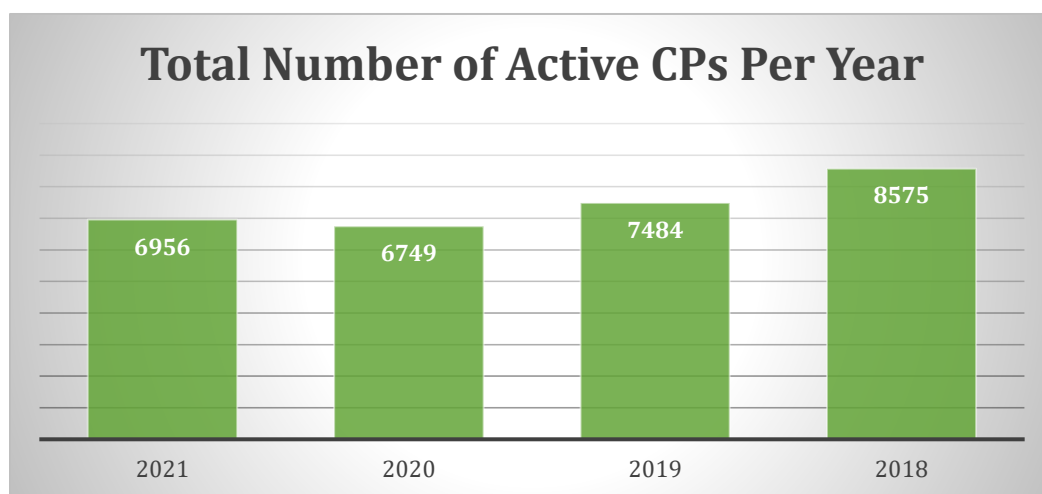
Certifications

NALA offers two certifications – the Certified Paralegal (CP) and the specialty certification, the Advanced Certified Paralegal (ACP). Established in 1976, the Certified Paralegal (CP) credential is key to respect and opportunity throughout the legal profession. Becoming a NALA Certified Paralegal means you have successfully passed a rigorous examination of the knowledge necessary to be an effective paralegal. Earning this credential is a proud achievement that comes with a career-long commitment.

The CP Examination is a comprehensive assessment based on federal law and procedures. Successful completion of both the Knowledge and Skills Exams is required to obtain the CP credential. While the CP exam tests your general knowledge, NALA's Advanced Certified Paralegal (ACP) courses are designed to advance your education in specific areas of law. These web-based, interactive courses are available 24/7, allowing you to complete them at your own pace.

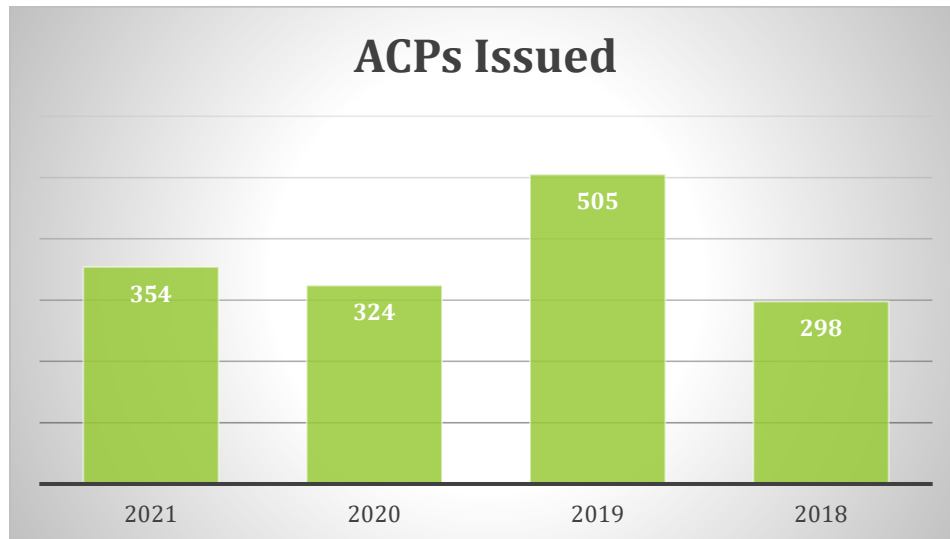
CERTIFIED PARALEGAL CERTIFICATION

The charts on this page provide detail on the Certified Paralegal (CP) Certification.



ADVANCED CERTIFIED PARALEGAL CERTIFICATION

The following chart lists the total number of Advanced Certified Paralegal specialty credentials issued. The total number of ACPs issued through the end of 2021 is 354.



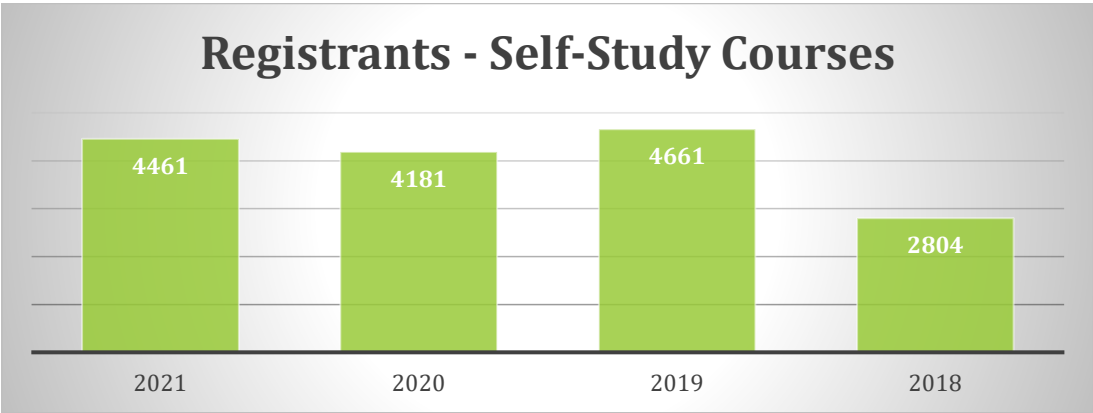
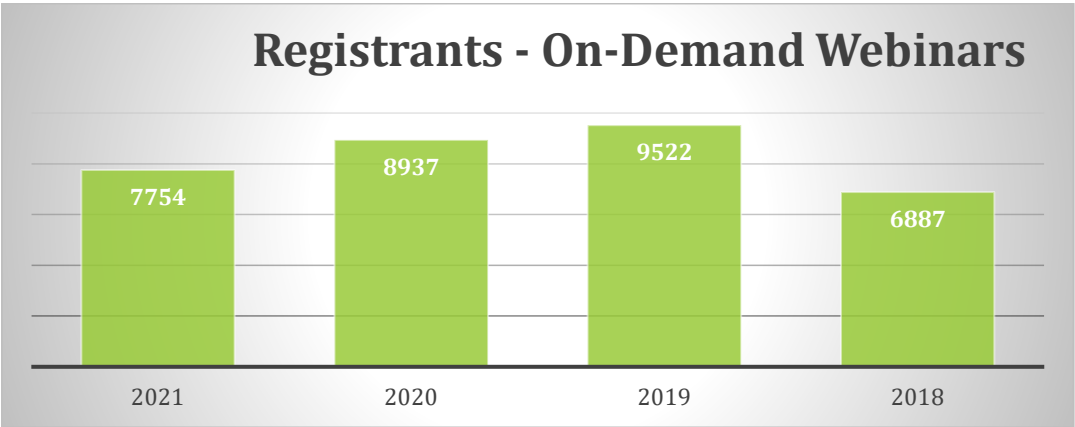
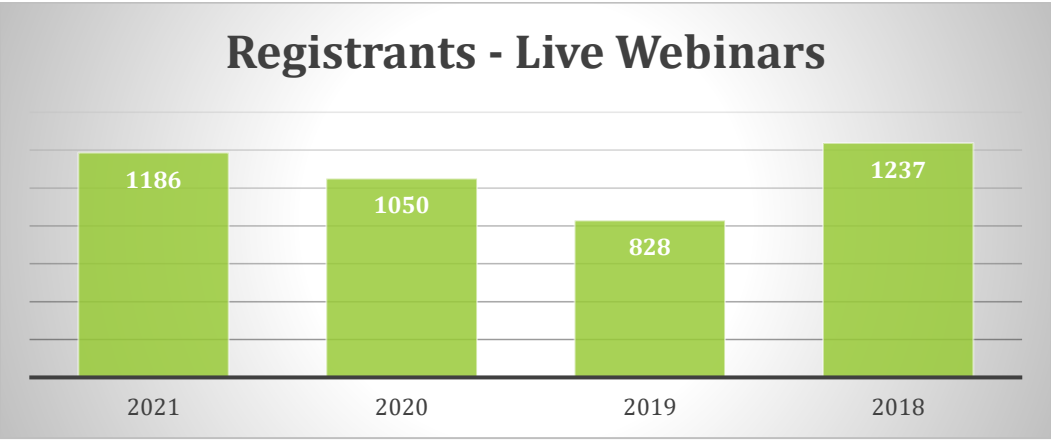
NALA is the only National Commission for Certifying Agencies (NCCA) accredited paralegal certification program. NALA's Certified Paralegal Program has been recognized both nationally and internationally for over 40 years. Our CP Credential has been acknowledged by the American Bar Association as a mark of high professional achievement, and more than 47 other paralegal organizations and numerous bar associations also acknowledge the credential as the paralegal standard. We provide a professional experience while still being personable with our certificants. From the application process to maintaining the certification, NALA is affordable for paralegals.



Education

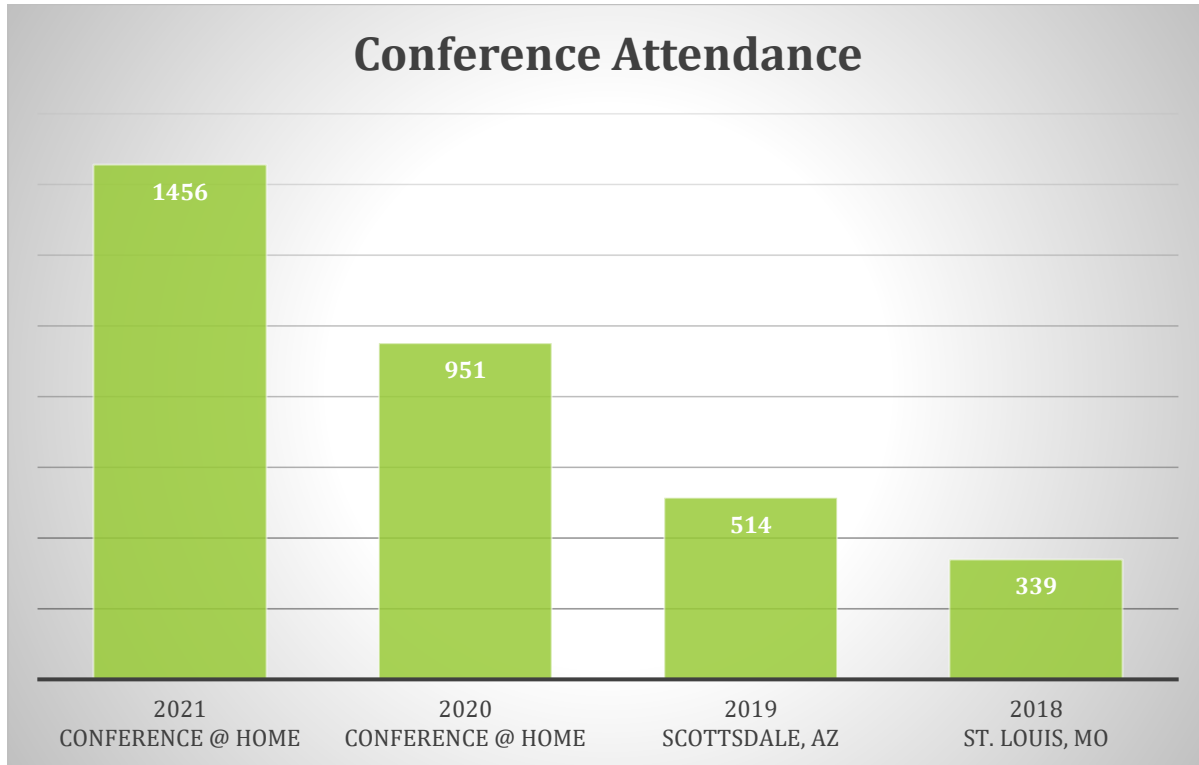
ONLINE EDUCATION

NALA offers a variety of education primarily through its delivery of live and on-demand webinars and self-study courses.



CONFERENCE & EXPO

The 2020 Conference & Expo was switched to a completely virtual event, due to social distancing requirements resulting from the COVID-19 pandemic. As 2021 developed, it became clear that the 2021 Conference & Expo would need to be virtual again. After setting a high benchmark in 2020 of 951 virtual attendees in 2020, the 2021 Conference @ Home had 1,456 attendees.



[t]he process whereby the Accused and the Prosecutor in a criminal case work out a mutually satisfactory disposition of the case subject to court approval. It usually involves the defendant's pleading guilty to a lesser offense or to only one or some of the counts of a multi-count indictment in return for a lighter sentence than that possible for the graver charge."

Black's Law Dictionary

Plea Bargaining Definition
Trial or Plea - which is best for a given defendant?

NALA | THE PARALEGAL ASSOCIATION

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Session Info Speaker Info Files Feedback Q&A **Note Taking** Polling

Notes for CP Review - Criminal Law

Save Email Notes

Enter your notes here, and click save.

Chat

Korinne Morris: WOW!!!

Deborah Kohlhaas: What host!

Jillian Sherman: WOW!!!

Kai Huffman: Nice! Melissa!

Sandra Davidson: That is awesome!!!

Bea Leffner: Wow so cool

Carl Morrison, ACP, CAS, RP, PP, AACP: AMAZING!!!!

Larise Curtis: Congratulations

Yoko Kuro: North Dakota Strong! Madam President! How cool is that!

Kelley Pogulis: That's awesome! Congratulations Melissa!

Joyce Jacobs: What! that is so nice!!!

Ashlene Berry: WOWWWWWWWWWWW

Michelle Hansen: WOW!! How amazing!

Carla Dennis: Awesome!

Paula Deep: That's Awesome!!!

Deborah Fieble: Awesome!

Jennifer Finch: wow! congrats Melissa

Lela Garcia: That's very special - congratulations!

Jackie Van Dyer: Wow, Melissa! incredible recognition!

Sandi Joshua: How cool. Speech

Sharon Jones: Wow, super major!

Type your message here and press enter:

CSA Violations

- Marijuana is a Schedule 1 drug under the CSA.
- It is unlawful to "manufacture, distribute, dispense, or possess with intent to manufacture, distribute, or dispense," marijuana in any form. *Id.* at § 841(a).
- The CSA also makes conspiring to violate the CSA unlawful, 21 U.S.C. § 846.

CSA Penalties

- Quantity < 100 plants: minimum of five years imprisonment and a fine of \$25M organization
- Quantity < 1,000 plants: minimum of ten years imprisonment and a fine of \$50M organization
- Any person "convicted of engaging in a continuing criminal enterprise," shall forfeit "any of his interest in, claims against, and property or contractual rights affording a source of control over, the continuing criminal enterprise." *Id.* at § 853

NALA | THE PARALEGAL ASSOCIATION

CONFERENCE LOCATION HISTORY

2021 – Conference @ Home (Virtual)
 2020 – Conference @ Home (Virtual)
 2019 – Scottsdale, AZ
 2018 – St. Louis, MO
 2017 – Orlando, FL
 2016 – Las Vegas, NV
 2015 – Tulsa, OK
 2014 – Charleston, SC
 2013 – Portland, OR
 2012 – Omaha, NE
 2011 – Plano, TX
 2010 – Jacksonville, FL
 2009 – San Diego, CA
 2008 – Oklahoma City, OK
 2007 – New Orleans, LA
 2006 – Tampa, FL
 2005 – Kansas City, MO
 2004 – Reno, NV
 2003 – San Antonio, TX
 2002 – Savannah, GA
 2001 – Reno, NV
 2000 – St. Louis, MO
 1999 – Tampa, FL

1998 – Colorado Springs, CO
 1997 – Washington, DC
 1996 – New Orleans, LA
 1995 – Tulsa, OK
 1994 – Reno, NV
 1993 – Nashville, TN
 1992 – Bismarck, ND
 1991 – Colorado Springs, CO
 1990 – Washington, DC
 1989 – Honolulu, HI
 1988 – Las Vegas, NV
 1987 – Philadelphia, PA
 1986 – Tulsa, OK
 1985 – San Francisco, CA
 1984 – Norfolk, VA
 1983 – Albuquerque, NM
 1982 – Nashville, TN
 1981 – Minneapolis, MN
 1980 – Denver, CO
 1979 – Hollywood, FL
 1978 – Indianapolis, IN
 1977 – New Orleans, LA
 1976 – San Francisco, CA



Financial Summary

These numbers are from the 2021 audited financials completed by HoganTaylor LLP accounting firm in Tulsa, OK. Net assets increased by 16% and net revenue was \$123,754.

NET ASSETS AT YEAR END

Assets	2021	2020
Total Net Assets	\$1,127,637	\$973,798

SUMMARY OF REVENUE & EXPENSES

	2021	2020
Revenues	\$1,944,687	\$1,792,671
Expenses	\$1,820,933	\$1,610,845
Net	\$123,754	\$181,469

NALA Board of Directors (2021-2022)

 <p>President Melissa J. Hamilton, ACP</p>	 <p>Vice President Debra L. Overstreet, ACP</p>	 <p>Secretary Cheryl J. Nodarse, ACP</p>	 <p>Treasurer Peonca S. Grier, CP</p>	 <p>CEO Vanessa Finley, MBA, CAE</p>
 <p>Certifying Board Chair Lisa M. Stone, ACP</p>	 <p>Continuing Education Council Chair Alicia R. Mitchell-Mercer, ACP</p>	 <p>Professional Development Committee Chair Melissa M. Klimpel, ACP</p>	 <p>Affiliated Associations Director Bridget M. Stuhr, CP</p>	
 <p>Area 1 Director Dana G. Welcker, ACP</p>	 <p>Area 2 Director Angela A. Oberle, ACP</p>	 <p>Area 3 Director Vicki L. Kasper, ACP</p>	 <p>At Large Director Richard Hahn, ACP</p>	 <p>At Large Director Cassie D. Snyder, ACP</p>

Board of Directors Activities

NALA's Board of Directors is responsible for the governance of the association.

Actions of the Board for 2021-2022

- Approved the appointment of Alicia Mitchell-Mercer, LPP, CSM, NCCP, SCCP, CP, ACP, RP, as Continuing Education Council Chair and Melissa M. Klimpel, ACP, as Professional Development Committee Chair.
- Ratified the appointments of standing committee members as follows: Continuing Education Council to each serve 3-year terms: Korrine R. Morris, ACP, Sheila Grela, ACP, and Desiré Smith, ACP; Professional Development Committee to each serve 3-year terms: Kelly Elder, ACP, and Debby Sawyer, ACP; Ethics Chair to serve 1-year term: Caroline Wilkerson, ACP; Diversity, Equity, and Inclusion Chair to serve 1-year term: Yolanda A. Garcia, CP, TBLS-BCP, and Adrienne D. Berry, ACP; Nominations Committee Co-Chairs to serve 1-year terms: Jill I. Francisco, ACP, and Cheryl J. Nodarse, ACP.
- Ratified the appointments of Angela A. Oberle, ACP, and Bridget M. Stuhr, ACP, as additional members of the Executive Committee for the 2021-2022 fiscal year.
- Approved Bank of America be a designated depository of the National Association of Legal Assistants, Inc. and that the Corporate Bank Resolution of Bank of America be adopted.
- Approved Vanessa (Vinnie) Finley, MBA, CAE, NALA Chief Executive Officer, Melissa J. Hamilton, ACP, NALA President, Peonca S. Grier, CP, FRP, NALA Treasurer, and Mariah Williams, NALA Administrative Manager, be authorized signatories for all bank accounts of the National Association of Legal Assistants, Inc.
- Approved Vanessa (Vinnie) Finley, MBA, CAE, NALA Chief Executive Officer, Melissa J. Hamilton, ACP, NALA President, and Peonca S. Grier, CP, FRP, NALA Treasurer, be authorized to execute any and all loan documents deemed necessary by the Board of Directors of the National Association of Legal Assistants.
- Approved the minutes of the First Regular meeting of the 2021-2022 Board of Directors held virtually on July 24, 2021.
- Approved the 2022 Budget as presented by the Budget Committee.
- Approved entering into an Executive Session to discuss the CEO review for the period November 2020-November 2021.
- Approved the doing business as (dba) registration of “NALA – The Paralegal Association” as a part of its incorporation with the Oklahoma Secretary of State.
- Approved the recommendation of an amendment of Bylaws - Article III Membership - 3.10 Voting by Individual Proxy to reduce the time from 30 days to 5 days to fit the electronic voting window, and to add “or staff” to the language so as to allow proxy designations to be received by the secretary or staff.
- Approved renaming the award from “Hall of Fame” to “Unsung Heroes Hall of Fame” and approve the amendment of Paragraph G, Section XIX. Awards – Member Recognition Programs – Judging Criteria, of the NALA Policy and Procedure Manual.
- Approved the amendment of Paragraph E., Section XVI. Continuing Education Council Purpose and Policy Statement, of the NALA Policy and Procedure Manual and Paragraph B, Section XVII. Professional Development Committee Purpose and Policy Statement, of the NALA Policy and Procedure Manual.
- Ratified the NALA Affiliated Association Director’s recommendation for approval of Houston Metropolitan Paralegal Association as a NALA Affiliated Association.

- Ratified the appointments of standing committee members as follows: Diversity Equity, and Inclusion committee members to serve a 2-year term – Debra Overstreet, ACP; and Sarah Duggan, CP. Nominations Committee to serve a 1-year term – Jane McKinnon, ACP.
- Approved the waiver of notice by mail of the time and place of the Annual Meeting, and, in lieu thereof, publish Notice in accordance with Sections A(3.16) and B(3.16) of the NALA Bylaws.
- Approved the President and CEO to refer to NALA Counsel specific issues related to protecting the NALA trademarks and CP accreditation.
- Approved moving forward with engaging Mettise to assist in developing the new leadership program.
- Approved the recommendation to sunset the Nomination Committee and remove references to it from the Policy and Procedure Manual.
- Approved the proposed revisions to the “Conflict of Interest” policy and the proposed template for the “Non-Disclosure” and “Conflict of Interest” policy agreement.
- Approved the proposed revisions to the language in the Policy and Procedures Manual to update the election process and allow for electronic voting of the Affiliated Associations Director and Affiliated Associations Secretary.
- Approved the addendum to its definition to read as follows: “The ABA adopted a revised definition in 2020, removing the term “legal assistant.” NALA realizes that the terms legal assistant and paralegal are used in the United States. NALA recognizes and supports paralegals, regardless of title; however, as an organization, we primarily use the term paralegal.”
- Approved the recommendations of the Awards Committee and award Belinda Ann Thomas, ACP, and Annette R. Brown, ACP, as recipients of the 2022 NALA Unsung Heroes Hall of Fame Award.
- Approved the minutes of the Second Regular meeting of the 2021-2022 Board of Directors held on November 4, 2021.
- Approved the minutes of the Executive Session of the Second Regular meeting of the 2021-2022 Board of Directors held on November 4, 2021.
- Approved the ballots for the election of the 2022-2023 President be destroyed.
- Declared Debra L. Overstreet, ACP, as NALA President for 2022-2023.



NALA Certifying Board

The NALA Certifying Board is responsible for content, standards, and administration of the Certified Paralegal Program. It is composed of paralegals who have received the Certified Paralegal Certification designation, attorneys, and paralegal educators who ensure that exam rules and regulations are carried out in compliance with the law and generally accepted certification testing practices, and in a way that ensures the financial stability of the program.

CERTIFYING BOARD MEMBERS

Lisa M. Stone, ACP (Chair)

Kimberly A.S. Brown, ACP (Past Chair)

Cathy L. Davis, ACP

Jennifer M. Devine, ACP

Tammy Manning Dickerson, CP

Torii Ransome Freeman, JD

Donna W. Gilliland, ACP

Kye W. Haymore, JD

Jaye L. Koch, ACP

Nanci L. Lilja, ACP

Christine K. Lillo, ACP

Tracie L. Livesay, ACP

Carl Morrison, ACP

Tom Pokladowski, Esq.

Shannon Moran Simler, J.D.

Melissa J. Hamilton, ACP
NALA President

Vanessa Finley, MBA, CAE
NALA CEO

Standing Committee Reports

NALA relies on its volunteer base to provide exceptional products to the paralegal industry. To learn more about NALA's standing committees or its members, please view our website.

CONTINUING EDUCATION COUNCIL (CEC)

The CEC is responsible for selecting NALA's educational offerings for webinars and the Conference & Expo, along with determining the content for NALA's quarterly magazine publication, *Facts & Findings*.

CEC MEMBERS

Alicia Mitchell-Mercer, ACP
(Chair)

Lucinda Calhoun

Sheila A. Grela, ACP

Eva Merrell, MBA, ACP

Korinne R. Morris, ACP

Deborah M. Paul, ACP

Laura Reaves, ACP

Shannon Rezanina, ACP

Desire D. Smith, CP

Jackie Van Dyke, CP

Deana Waters, ACP

Melissa J. Hamilton, ACP
NALA President

Vanessa Finley, MBA, CAE
NALA CEO

PROFESSIONAL DEVELOPMENT COMMITTEE (PDC)

The PDC is responsible for reviewing and maintaining the NALA Model Standards and Guidelines for Utilization of Paralegals, maintaining the NALA Code of Ethics and Professional Responsibility, providing professional development content for *Facts & Findings*, overseeing the development of professional development courses, and keeping up to date on activities affecting the paralegal profession.

PDC MEMBERS

Melissa M. Klimpel, ACP
(Chair)

Kristine Custodio Suero, ACP

Kelly S. Elder, ACP

Jennifer R. Finch, ACP, FRP

Kaila Glaros, ACP

Airolyn Loggins, ACP

Debby J. Sawyer, ACP

Caroline C. Wilkerson, ACP
(Ethics Chair)

Melissa J. Hamilton, ACP
NALA President

Vanessa Finley, MBA, CAE
NALA CEO

DIVERSITY, EQUITY, AND INCLUSION COMMITTEE (DEI)

The DEI Committee furthers the goals of the Corporation to encourage, support, and maintain high standards in DEI; monitors DEI trends and issues; works to address DEI to foster meaningful, open, and constructive dialog throughout the Corporation to celebrate diversity of its members and leaders; works within the Corporation to celebrate the diversity of its members and leaders; and strengthens DEI initiatives throughout the Corporation.

DEI MEMBERS

Yolanda A. Garcia, ACP
(Chair)

Adrienne D. Berry, ACP

Sarah Duggan, CP

Debra L. Overstreet, ACP

Melissa J. Hamilton, ACP
NALA President

Vanessa Finley, MBA, CAE
NALA CEO

Company Information



National Association of Legal Assistants, Inc.

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Twitter: @NALA_Paralegals

Facebook: NALA.Paralegals

LinkedIn: NALA – The Paralegal Association

NALA STAFF

Vanessa Finley, MBA, CAE
Chief Executive Officer

JessicaLynn Nazarian
Marketing Specialist

Cate Bengé
Member Services Representative – Office
Administration

Patrice Pratt
Manager of Member Engagement and
Retention

Tracy Creamer
Education Manager

Sabrina Smith
Member Services Representative -
Certification

Melody Drew
Certification Manager

Paula VanStraten
Director of Projects & Executive Support

Leslie Gardner
Communications Specialist

Paul Watson, CPA
Controller

Bonita Harris
Member Services Representative – Affiliated
Associations

Mariah Williams
Director of Operations

Sarah Jefferies
Member Services Representative - Education

Vanessa Williamson
Member Services Representative -
Membership

Chelsea Minyard
Member Services Representative -
Recertification