NORTH CAROLINA BAR ASSOCIATION
PARALEGAL DIVISION

LEADERSHIP ORIENTATION MANUAL
2019-2020
WELCOME AND INTRODUCTION

Welcome and congratulations on your election as a Paralegal Division Council Member, Officer or Committee Chair!

As one of the largest divisions/sections within the North Carolina Bar Association (“NCBA”), the Paralegal Division provides its members opportunities for education, service and leadership.

The Paralegal Division (formally, the NCBA Legal Assistants Division) was created on April 26, 1997 by unanimous approval of the NCBA Board of Governors. The Division was formally established in January 1998 when over 100 paralegals became members of the Division and quickly grew to over 400 members by the time of its Organizational Meeting on May 15, 1998.

As written in the Bylaws, the Division shall have as its purpose the promotion of the general welfare of the community and public service, the advancement of the professional education and welfare of paralegals, adherence by its members to the code of ethics and professional responsibility adopted by the Division, adherence by its members to minimum educational requirements, continuing education requirements and standards of practice adopted by the Division, provision for paralegals to participate in the activities of the Association and advancement of the standards of the legal profession and the administration of justice.

Your dedication and service will play an integral part in the continued success of the Division.
# TABLE OF CONTENTS

This orientation manual is designed to serve as a reference and provide an overview of the Paralegal Division, North Carolina Bar Association and North Carolina Bar Foundation.

## Chapter 1: General Information

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Overview</td>
<td>1</td>
</tr>
<tr>
<td>1.2 Paralegal Division Council</td>
<td>2</td>
</tr>
<tr>
<td>1.3 Council Terms and Succession</td>
<td>2</td>
</tr>
<tr>
<td>1.4 Division Committee Descriptions</td>
<td>2</td>
</tr>
<tr>
<td>1.5 Section Liaisons Committee</td>
<td>4</td>
</tr>
<tr>
<td>1.6 NCBA and NCBF Committees</td>
<td>4</td>
</tr>
<tr>
<td>1.7 NCBA Departments</td>
<td>5</td>
</tr>
</tbody>
</table>

## Chapter 2: Paralegal Division Council Meetings

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Attendance - Officers and Council Members</td>
<td>6</td>
</tr>
<tr>
<td>2.2 Attendance and Requirements for Committee Chairs/Section Liaisons</td>
<td>6</td>
</tr>
<tr>
<td>2.3 Voting</td>
<td>7</td>
</tr>
<tr>
<td>2.4 Meeting Minutes</td>
<td>7</td>
</tr>
<tr>
<td>2.5 Treasurer’s Report</td>
<td>7</td>
</tr>
</tbody>
</table>

## Chapter 3: Meeting Dates 2019-2020

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.1 Paralegal Division Dates</td>
<td>8</td>
</tr>
<tr>
<td>3.2 NCBA Dates</td>
<td>8</td>
</tr>
</tbody>
</table>

## Appendix

1. Appendix A (Bylaws)
2. Appendix B (NCBA Paralegal Division Roster 2019-2020)
3. Appendix C (NCBA Paralegal Division Section Liaison Listing)
4. Appendix D (NCBA Paralegal Division Section Liaison Overview Checklist)
CHAPTER 1: GENERAL INFORMATION

1.1 OVERVIEW

Governance

The Paralegal Division (“PD” or “Division”) is a Division within the North Carolina Bar Association. The PD is governed by the Bylaws of the Association and the Bylaws of the Division. A copy of the Bylaws are located in the Appendix, as well as on the PD website.

North Carolina Bar Association

Mission Statement – To serve the public and the legal profession by promoting the administration of justice and encouraging the highest standards of integrity, competence, civility and well-being of all members of the profession.

Diversity Statement – The NCBA is an inclusive organization committed to recognizing, respecting, promoting and encouraging diversity among its leadership, its membership and the entire legal community.

NCBA Board of Governors

The North Carolina Bar Association (NCBA) Board of Governors provides leadership and governance to the NCBA.

The voting members of the Board of Governors are the President, President-Elect, Immediate Past President, six Vice Presidents, twenty-one Board Members (three rotating classes of seven members), Chair of the Young Lawyers Division and Chair of the Senior Lawyers Division. A list of the Board of Governors is located on the Bar’s website.

The Chair of the PD and all Section Chairs hold non-voting seats on the Board of Governors.

North Carolina Bar Foundation

The NCBF is supported by donations to the Annual Fund Campaign and engages NCBA member attorneys, paralegals and law students as volunteers in statewide public service and pro bono programs. The NCBF Endowment makes grants to support access to justice, civic education, professionalism and law-related public service and pro bono initiatives statewide, including many NCBA Sections and Division sponsored pro bono and public service projects.

Mission Statement – Uniting the talent and generosity of our profession to be a power of greater good for the people of North Carolina.

Vision Statement – A vibrant North Carolina where legal services are available to all, regardless of ability to pay; where members of the legal profession provide community service and leadership that profoundly impacts the public, thereby demonstrating the value of our profession to society;
and where all North Carolinians understand and have confidence in a legal system that serves

North Carolina Bar Association Staff

Jason Hensley is the Executive Director of the NCBA and NCBF. Lauren Colvard is the Communities Manager (“Staff Liaison”) to the PD. The Staff Liaison is the vital link between the NCBA and the Council, and is key to our success and growth. The Staff Liaison coordinates PD meetings, distributes important communications to the membership, attends Council meetings, offers support and guidance on NCBA rules, regulations and provides other information/support as needed.

A listing of all NCBA staff members is available on the NCBA website. Please note to copy the Staff Liaison and the Division Chair on any written communications with any NCBA staff member.

1.2 PARALEGAL DIVISION COUNCIL

The Paralegal Division Council provides leadership, general supervision and control of the Division’s affairs.

As with the Board of Governors, the PD Council is comprised of voting and non-voting members. Voting Members are the Chair, Vice-Chair, Secretary, Treasurer (the “Officers”), the Immediate Past Chair, twelve Council Members and a Board of Governors liaison. Committee Chairs, Section and NCBA/NCBF Committee liaisons and the Staff Liaison are non-voting members.

The current Council Member Roster is located in Appendix B. The Staff Liaison updates the roster as needed.

1.3 COUNCIL TERMS AND SUCCESSION

PD Officers serve one year terms. PD Council Members serve three year terms, unless a Council Member is selected to fill a vacancy, then that person will serve the remaining term of the vacancy. Terms commence on July 1 and end June 30 (concurrent with each Bar year). Once a Council Member completes a 3-year term, they may be considered for an Officer role of Treasurer or Secretary. If a Council Member is serving a less than three-year term, they may reapply for consideration to serve a three-year term.

Generally, the path to serving as Division Chair is a five year commitment, generally, beginning as Treasurer moving up through serving as the Division’s Immediate Past Chair.

1.4 DIVISION COMMITTEE DESCRIPTIONS

In accordance with our Bylaws, the Division has standing committees, special committees and liaisons to NCBA Sections. These Committees play an integral role in carrying out the purpose and mission of the Division and provides additional leadership opportunities for Division members.
Current PD Committees

Awards - The Awards Committee coordinates the creation/revision and distribution of the nomination forms for the Distinguished Paralegal Award to Paralegal Division members. The Committee reviews the nominations and decides the recipient. The recipient is announced at the PD Annual Meeting and recognized during the Awards Banquet during the NCBA Annual Meeting.

Bylaws - The Bylaws Committee reviews any proposed bylaw amendments, drafts initial language, presents the proposed amendment to the Council for consideration and, if approved by the Council, ensures proper procedure is followed for approval by the membership and NCBA Board of Governors. The Committee will be chaired by a past Division Chair.

CPE - The Continuing Paralegal Education Committee is responsible for directing, planning, and implementing all Continuing Education programs on behalf of the PD. CPE offerings may include webinars/webinar series, on demand replays, live seminars, and the Paralegal Division Annual Meeting, which shall be conducted in consultation with the NCBA CLE Department.

Ethics - The Ethics Committee addresses ethical issues that come before the Committee and reports such matters to the Chair and Council and membership as necessary. This Committee updates the Code of Ethics (as necessary).

Historian - The Historian Committee researches how the profession has changed, documents special PD accomplishments in an ongoing annual history report and archives important documents, photographs, videos, etc.

Long-Range Planning - The Long-Range Planning Committee will ensure continuity of leadership year over year, support the goals set by the Division and select dates/locations for future annual meetings. The Division’s Immediate Past Chair will serve as Chair and Committee members will be comprised of the Chair, Vice Chair, Secretary and Treasurer.

Membership - The Membership Committee promotes PD membership across the state for paralegals and paralegal students/schools across the state.

Nominations - The Nominations Committee is responsible for nominating candidates for the offices of Secretary, Treasurer and Council members to be announced during the Division’s annual meeting, and shall submit two recommendations each for Chair and Vice Chair of the Division to the President-Elect of the Association in writing by no later than March 1st of each year. The Division’s Immediate Past Chair will serve as Chair of this Committee and Committee members will be comprised of other Past Chairs only.

Pro Bono - The Pro Bono Committee works with the NCBA Public Service Advisory Committee to encourage attorney and paralegal participation in Pro Bono programs sponsored by the North Carolina Bar Foundation and with any Division initiatives.
Publications (aka Communications/Blog) - The Publications Committee is responsible for soliciting and maintaining content relevant to the profession regularly via the Division’s blog (www.ncbarblog.com). This content shall include notices, newsletters, articles of a substantive nature, and any other information deemed necessary by the Chair, Council or Committee for the general benefit of members.

Scholarship - The Scholarship Committee creates the Division’s scholarship programs (currently the CPE Premier Pass Giveaway and NCCP Exam Review Course Giveaway), consults the Council on any potential changes or updates and works with the Staff Liaison to announce/promote the scholarship opportunities to the membership and awards the PD scholarships.

Survey - The Survey committee prepares, distributes and tabulates the results of the PD Survey, which may include information about education, salary, benefits, and important issues being addressed by the PD as a benefit to members for use in their professional advancement and development.

Technology - The Technology Committee assists the NCBA with the upkeep of PD web page to keep content current and relevant.

Utilization – The Utilization Committee creates and maintains a standard paralegal utilization guide/pamphlet for use by NCBA membership, North Carolina law schools, and North Carolina paralegal programs focused on increasing attorney awareness of the proper utilization of paralegals in the legal office or department.

1.5 SECTION LIAISONS COMMITTEE

The Section Liaison Committee is composed of PD liaisons to the specialty section of the NCBA, and through its members’ participation, strives to increase attorneys’ awareness of paralegals within the section’s area of practice, promotes confidence in the paralegal profession, and raise attorneys’ standards for and expectations of paralegals. A list of the current NCBA Sections with current PD liaisons and the “NCBA Paralegal Division Liaison Overview Checklist” are attached as Appendix C for additional instructions and responsibilities.

1.6 NCBA AND NCBF COMMITTEES

<table>
<thead>
<tr>
<th>NCBA Committees</th>
<th>NCBF Committees</th>
</tr>
</thead>
<tbody>
<tr>
<td>4ALL Statement Service Day</td>
<td>Lawyer Referral Service</td>
</tr>
<tr>
<td>Annual Meeting</td>
<td>Legislative Advisory</td>
</tr>
<tr>
<td>Appellate Rules</td>
<td>Membership</td>
</tr>
<tr>
<td>Awards and Recognitions</td>
<td>Minorities in the Profession</td>
</tr>
<tr>
<td>NCBA Civic Education &amp; Community Engagement</td>
<td>NCBF Programs</td>
</tr>
<tr>
<td>Communications</td>
<td>Pro Bono</td>
</tr>
<tr>
<td>Continuing Legal Education Advisory</td>
<td>Professionalism</td>
</tr>
<tr>
<td>NCBF Development</td>
<td>Professionalism Vitality</td>
</tr>
<tr>
<td>Future of Law</td>
<td>Transitioning Lawyers Commission</td>
</tr>
<tr>
<td>Judicial Independence &amp; Integrity</td>
<td>Women in the Profession Committee</td>
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</table>
Members of the Paralegal Division also serve as liaisons to several of the NCBA’s Committees. These positions are appointed by the President of the Association. The Division Chair can recommend candidates for this position. Liaisons provide reports on significant activity of these committees at Council meetings as necessary.

Members of the Paralegal Division are encouraged and invited to participate in many of the initiatives sponsored by the Foundation.

1.7 NCBA DEPARTMENTS

Center for Practice Management (CPM) - Free in-house law practice consultancy for NCBA Members. They are able to speak at CLE/CPE on issues related to practice management and technology.

Communities - Provide relevant and timely resources for members of 31 sections, four divisions, and eight specific communities. The staff works hand-in-hand with leaders of Communities and their respective governing bodies to organize CLEs, statewide networking events to engage members which help retention and recruitment of the community. The department also oversees specific budgets, ListManager, publications, pro bono programs, community website and different types of CLEs.

Continuing Legal Education (CLE) - Provides quality learning experiences to meet the competency needs and N.C. State Bar regulatory requirements for attorneys and paralegals. Housed within the CLE Department is the publications division, which provides a host of professional print and electronic material including attorney desk books, guides and practice manuals.

Development - Supports the charitable mission of the Foundation through fundraising and facilitates the following programs: the Annual Fund Campaign, Justice Liberty, and Lawyer Impact Funds, Legacy Gifts, Liberty Garden, and Endowment Gifts.

External Affairs and Communications - Works closely with the executive director and Marketing Department in supporting NCBA and NCBF objectives. Oversees publication and distribution of North Carolina lawyer magazine, E-Bar and more.

Finance & Accounting - Provides monthly financial reports to the Division.

Governmental Affairs - NCBA’s lobbying arm and presents to governmental bodies and entities the positions adopted by the NCBA on legislative or administrative matters.

Marketing - Supports and furthers the goals of the NCBA and NCBF by sharing success stories and vital information about the organizations and enhance communications and connections between members. Produce and direct digital media content, including NCBarBlog and social media channels, websites, monthly newsletters and more.
Membership - Helps sustain and grow a diverse membership body by coordinating membership outreach, promoting member benefits and more.

Member Services and Support - Ensures a positive member experience by serving as a single-convenient point of contact to inquire about membership-related items such as billing, website portal inquiries, address changes, event questions and all member benefit questions.

Public Service and Pro Bono - Serves NCBA members and members of the public by connecting resources with needs and strives to develop and implement unique and meaningful pro bono and public service projects, encourage attorney and paralegal participation, provide training to attorneys and paralegals in pro bono related subject areas, and supports the legal service providers in North Carolina through fundraising and service collaboration.

CHAPTER 2: PARALEGAL DIVISION COUNCIL MEETINGS

2.1 ATTENDANCE - OFFICERS AND COUNCIL MEMBERS

Officers and Council Members are required to attend all meetings. Members are strongly encouraged to attend as many meetings as possible in person. Phone conferencing can be made available (based on availability at meeting location) for the convenience of members of the Council.

If an officer or Council Member is unable to attend a meeting in person or by telephone, it is the responsibility of that individual to provide a written reason for her/his absence to the Chair and Staff Liaison at least 24 hours prior to the start of the next meeting. In the event you cannot attend and it is within 24 hours of the next meeting, please leave a voice message with the Staff Liaison and follow-up email to the Chair and Staff Liaison. All excusable absences will be confirmed by vote of the Council.

Pursuant to the Division’s Bylaws (Section V.5) “if any officer or Council member shall fail to attend two successive meetings of the Council, the office or seat on the Council held by such person shall automatically be vacated unless the Council excuses that person for good cause.” Therefore, it is important that Officers and Council members provide timely RSVPs to each meeting.

2.2 ATTENDANCE AND REQUIREMENTS FOR COMMITTEE CHAIRS/SECTION LIAISONS

Committee Chairs are invited and requested to attend Council Meetings. Committee Chairs provide valuable input and insight into the items the Council discusses. Committee Chairs are responsible for providing either a written or oral report on the activities of that Committee. Please email your report to the Chair and Staff Liaison at least one week in advance of the Council Meeting so your report can be included in the meeting packet. (It is your responsibility to bring copies of the reports with you to the meetings if you fail to submit your report by the submission deadline, which is generally two days prior to the meeting). In the event there is no activity to report, please inform the Chair.
Section and NCBA Committee liaisons are also invited to attend Council Meetings. The Council values your input to and interest in the Council. Any written reports are made available to the Council via the Section Liaison Committee Chair.

2.3 VOTING

Officers and Council Members are the voting members of the Council. Committee Chairs, NCBA Committee liaisons, Section liaisons and other invited guests are non-voting members. Voting members execute the procedural aspects of the Council meetings by making motions on business items presented to the Division and cast votes. All present may join in the discussion at hand.

*Note: Council meeting voting is different than the voting referenced in Section V.3 of the Paralegal Division Bylaws. Section V.3 addresses voting that occurs at the Paralegal Division Annual Meeting where all Paralegal Division members in attendance cast votes for Secretary, Treasurer and Council members.*

2.4 MEETING MINUTES

The Secretary is responsible for taking meeting minutes, recording attendance and timely submission of the minutes for the Chair’s review prior to the next Council meeting. The Staff Liaison distributes a copy of the meeting minutes to review prior to the next Council meeting. Please review and either submit any grammatical changes or corrections to the minutes prior to the meeting and send your changes to the Secretary, Chair and Staff Liaison. No grammatical changes will be made at the Council meeting but any substantive changes may be made at that time.

2.5 TREASURER’S REPORT

The NCBA Finance Department generates a monthly report of Division finances to the Staff Liaison who provides to the Treasurer, Chair and Vice Chair. The Treasurer will provide a review of the Division's finances at each Council Meeting. *Any requests for funding should be directed to the Treasurer, Staff Liaison and Chair approximately two weeks prior to the next Council Meeting.* The request will be discussed and voted on for approval by the Council. In the event approval is needed in between Council meetings, the Treasurer will present the request to the Chair who will then distribute for discussion and vote with the Council via e-mail.
CHAPTER 3: MEETING DATES 2018-2019

3.1 PARALEGAL DIVISION DATES

SUMMER MEETINGS

August 9, 2019  Orientation/Council Meeting/Retreat  Lexington, NC
August 10, 2018  Council Strategic Retreat  Lexington, NC

FALL MEETING

October 11, 2019  Council Meeting  NCBA Bar Center, Cary, NC

WINTER MEETINGS

January 10, 2019  Council Meeting  UNC Charlotte, Charlotte, NC

SPRING MEETINGS

April 24, 2020  Annual Meeting  New Bern Convention Center

3.2 NCBA DATES

June 25-28, 2020  NCBA Annual Meeting  TBD in Charlotte, NC
APPENDIX

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