

# Paralegal Focus

## INSIDE

**Membership Spotlight 4-5**

**PACE Posting 6-8**

**Annual Meeting and  
Conference 9-13**

**Region V Meeting 14-16**

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Paralegal Focus is the quarterly newsletter of the Vermont Paralegal Organization.

Vermont Paralegal Organization is a Member of the National Federation of Paralegal Associations (NFPA).

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## President's Message

By Carie Tarte

I am pleased to report that we had the most successful annual meeting to date on Thursday, May 10, at the Hampton Inn in Colchester. This success would not have been possible without the commitment and hard work of my CLE team members — Louise Reese and Corinne Deering. Also, I want to thank VPO member Kelly Sammel for making contact with Paul Van de Graaf, Esq., who presented on the Criminal Law Update, and to thank Laurie Noyes, who contacted Jennifer Goeke of Liberty Mutual, and asked her to return to present on Insurance 101. The efforts of these individuals, and all of our members in attendance, helped to make this annual meeting a record-breaking event.

The following vendors participated in the sponsorship program and supported the VPO at the annual meeting: Barton Agency, Thomson Reuters, AVTranz, April Pettengill of ALP Medical Consultants, LLC, and JC Image. Please support these vendors!

For those of you who were not able to purchase a VPO logo tote at the annual meeting, we still have some available for \$10. This price is for a limited time only while the initial supply is available. Once the totes on hand are gone, the price for each tote will increase. If you would like to purchase a tote, please contact Corinne Deering at [cdeering@pfclaw.com](mailto:cdeering@pfclaw.com).

Diane Brown, Lisa Laramee, and I recently attended the Region V meeting in Clifton Park, New York, along with associations from Connecticut, Rhode Island, New York, New Hampshire, and Massachusetts. I am very proud of the work that the VPO does, and what we are able to accomplish as an organization. The other associations of Region V take note of our successes at these meetings. I am honored to be a part of such a successful organization; I look forward to our continued success.

Be on the lookout for an announcement regarding a summer social, where we will roll out the next installment of our Activism Rewards Program.



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## Editor's Message

By Louise Reese

Once again, I am overjoyed by the number of members submitting articles for the *Paralegal Focus*. We can all learn a great deal from our peers; I hope you find this issue informative, interesting, and worth sharing with others who may not be members. For those of you unable to make it to the Annual Meeting and Conference, Julia Compagna interviewed our keynote speaker, Justice Beth Robinson, for this issue. Our Member Spotlight is about Melissa Young, a paralegal at Darby, Stearns, Thorndike and Ware. You will also find some tips about studying for PACE<sup>®</sup>, and photographs of community service at the Salvation Army.

I want to thank Kenneth Nosek and Julia Compagna for volunteering to join the newsletter editing team. Laura Gorsky has decided to step down from the Newsletter Committee so she can focus on preparing for the Vermont bar exam next year. We wish Laura all the best, and thank her for her commitment over the past year.

If you are interested in submitting a piece for the *Paralegal Focus*, please forward it to me at [lreese@dinse.com](mailto:lreese@dinse.com). I believe that the VPO newsletter is made great by the participation of our members.



Before entry of default can be obtained, V.R.C.P. 55(b)(5) requires you to prepare a supporting affidavit stating that the defendant is not on active duty with the military.

We recently received notice that the Department of Defense (DOD) has revised its portal, and information is now being reported differently. This is how it was explained in the notice:

When an order is placed, you will be asked for an "Active Duty Status Date". In other words, you are asked, "You are interested in the duty status of a person as of WHAT DATE?" If you enter no date, the date of order will be entered as the default.

Presently, no "start-date" is being given, although DOD indicates that it will resume providing this information in the future.

The DOD will also report whether a person or his/her unit is the subject of call-up orders. This may (or may not) be in addition to the information as to whether the person is on active duty.

Search results on all searches OTHER than "no information" responses (a "no information" response is given when DOD has no information that indicates that the person is on active duty) will include a link to a .pdf of the DOD status report.

Perhaps more important, the DOD now requires you to register your firm information in advance, and you will now be charged to run a name search. It was previously done at no cost. Go to [www.servicememberscivilreliefact.com](http://www.servicememberscivilreliefact.com) and click on the F.A.Q. link for registration information and the anticipated costs.

## Membership News

By Laurie S. Noyes, RP®

[lnoyes@primmer.com](mailto:lnoyes@primmer.com)

The warm weather is here, and summer is right around the corner. It's hard to believe that the year is almost half over! It seems like it just began.

VPO membership is on the rise again, after dipping slightly at the end of 2011. We are currently at 93 members, which means we have had 11 members either join the VPO or renew their membership since our last newsletter! Please join me in welcoming our newest members: Diane Drake, Ellen Howrigan Paradee, Andrea Spears, Marcy King, Robyn Sweet, Mary McGinniss, and Kristin Kittredge. I am excited that you have joined the VPO!

As some of you are aware, we held our first prize drawing for the inaugural year of the VPO Activism Rewards Program at the Annual Meeting on May 10, 2012, at the Hampton Inn. I am pleased to announce the program was a success, and more than 27 members earned 87 entries for the drawing! The entries were earned in various ways: attending VPO events, serving dinners at the Salvation Army, volunteering for a committee, attending board meetings, or writing articles for the VPO newsletter. The following members earned activism points this past year: Katie Beneke, Mary Tino, Penny Hannigan, Puspa Luitel, Kelly Sammel, Deb Ryan, Cathy Foutz, Katie Jahne, MaryBeth Prager, Lisa Macy, Laura Gorsky, Aimee Cardinal, Michael Roosevelt, Heather C. Moreau, Lucie Garand, Linda Wood, Leslie Anderson, Jayne Benoit, Elaine Moran, Audrey Holm-Hansen, Julia Compagna, Amanda Tucker, Lisa Laramée, Jayne Germain, Evelyn Wetzel, Monica Collins, and Melissa Young! I would like to thank everyone who participated. The winners at the Annual Meeting were as follows: (1) the one year free membership was won by Puspa Luitel, (2) the iPod Nano was won by MaryBeth Prager, and (3) the Kindle went to Cathy Foutz! Congratulations to all of our winners!

The new year for the VPO Activism Rewards Program has started, and you can begin earning your points toward next year's drawing right away. We have already had members earn points by serving at the Salvation Army on May 14, and by writing articles for this issue of *Paralegal Focus*. What a way to start the year off!

I, as NFPA Primary, was unable to attend the Region V meeting which was held on May 19 and 20. Luckily, President Carie Tarte, NFPA Secondary Diane Brown, and Professional Liaison Lisa Laramée were able to attend in my place, and are sharing the results of that meeting with you in this newsletter. As the NFPA 2012 Convention nears, you will begin receiving more emails requesting input on upcoming convention agenda topics. Please be sure to provide me with your feedback over the next few months so that I may adequately represent you and the VPO at the convention.

Finally, I want to remind everyone that we are using the VPO List Serv for all of the VPO's email blasts to members. To keep receiving your communications from the VPO, please keep us informed of any changes in email addresses. Please feel free to drop me a line if you've changed employers so that we can make sure you continue to receive VPO information.



# Q&A

## Melissa L. Young Member Spotlight

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<b>How old are you?</b>	34
<b>Describe your family?</b>	I have a wonderful family of five. Me, my fiancé, and our three boys, including a set of twins.
<b>Town in which you live?</b>	Bolton
<b>What is your favorite food?</b>	Lasagna
<b>Do have any pets? If so, what are they, and what are their names?</b>	We don't have any pets, but three young sons is equivalent to three puppies in my book.
<b>What kind of hobbies do you have?</b>	Gardening, walking, reading, clogging, and enjoying time with friends and family.
<b>How do you unwind at the end of a long work week?</b>	Sitting on my deck with someone to laugh with and a glass of wine while overlooking my garden.
<b>What is your educational background?</b>	I graduated summa cum laude in 1999 with a BA in psychology from Castleton State College, and I received my Paralegal Certificate in 2001 from Blackstone Paralegal Studies.
<b>Where do you work?</b>	Darby Stearns Thorndike Kolter & Ware, LLP in Waterbury, VT.
<b>When did you first become a paralegal?</b>	I started working as a legal assistant in 1999 right out of college, and I earned my Paralegal Certificate in 2001 while working at Winburn Law Offices in Manchester, VT.
<b>What area of law do you work in?</b>	I work as a civil litigation paralegal. I practice in the areas of family, business, environmental, tort and property law. I also assist in document preparation for estate planning and probate matters.
<b>What do you enjoy about working in that area of law?</b>	There is never a dull moment. There is always an interesting nuance to a case, and you meet all types of people. I majored in psychology because I wanted to help people, and as a litigation paralegal I am able to fulfill that goal on a daily basis in some way.

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<b><i>If you could work in any other area of law, what would it be?</i></b>	Medical malpractice. The cases are so interesting and challenging because you have the medical aspect to delve into, as well as the typical legal arguments and procedure. I have always been fascinated by anatomy and physiology.
<b><i>What is the one thing about being a paralegal you would change if you could?</i></b>	Increased statewide regulation and recognition of the profession in order to assist paralegals in being properly valued and utilized by their supervising attorneys. I also wouldn't mind making more money!
<b><i>How or why did you first enter the paralegal field?</i></b>	My honors thesis was based in psychology and the law regarding sympathy bias of jurors in a medical malpractice case. After I graduated I got an entry-level job in a law firm and really enjoyed it, so I studied to become a paralegal.
<b><i>Did you hold other positions, or have a different career, prior to becoming a paralegal, and if so, what was it?</i></b>	No. My first full-time job was as a legal assistant. I had always thought I would go back to graduate school and become a professor or a counselor of some sort, but now I am reading for the bar instead.
<b><i>What do you love about the paralegal profession?</i></b>	That I can perform attorney-level tasks and really be an integral part of working a case and helping a client. There is a lot of satisfaction in producing substantive legal work.
<b><i>What things about the profession do you dislike?</i></b>	I really can't think of anything. I really do enjoy my work and get a lot of satisfaction out of it. I am proud to be a paralegal!
<b><i>How long have you been a member of the VPO?</i></b>	I was a member several years ago for a few years, and then stopped when I stayed home to have and raise my babies. I renewed in January 2012.
<b><i>Tell me about the skills or traits you possess that you find most useful in your position?</i></b>	You need interpersonal skills, solid writing and research skills and a bright mind to be a successful paralegal. I have also found that our job requires a lot of energy, a great sense of humor, and the ability to enjoy working (at least a little) under the tremendous pressure of constant deadlines and large case loads. I think it helps to be slightly OCD as well. I love indexing my files. I have an innate need to know where everything is and to be able to find it quickly. If I were disorganized, I wouldn't have any hair left.
<b><i>What character oddities or personality traits do you find at odds with your career?</i></b>	Honestly, I don't find that I have any character traits that are at odds with the profession. I am type A, a little OCD, and not at all shy or afraid of confrontation. These traits/oddities/idiosyncrasies seem to help me in the profession which is probably why I enjoy it so much. They would probably cause problems for me in a lot of other professions, so thank goodness there is a niche for me!
<b><i>What brief advice or friendly tip would you offer to someone just entering the paralegal field?</i></b>	Just do it! Don't be shy about attempting work you haven't done before. The only way to really learn in this profession is to try. The more you learn to do, the more your supervising attorney will rely on you, leading to more satisfaction from your work.

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## **THE PACE® POSTING**

**By Corinne Deering, RP®  
Paralegal Certification Ambassador**

Congratulations to Heather Moreau and Ashley LaRose, the VPO's Paralegal Certification Exam Scholarship recipients for 2012. We wish them well on their plans to take the Paralegal Advanced Competency Exam ("PACE"). To assist Heather and Ashley with taking the exam, here are some tips about PACE:

- ◆ Tests critical-thinking and problem-solving skills used by experienced paralegals
- ◆ Not practice or state specific; limit study to national / federal level
- ◆ Test questions are complex — some straightforward, but most are conceptual, situational issues and involve problem solving
- ◆ Questions may be in a particular practice-area scenario, but they are really attempting to test core concepts that cut across practice lines
- ◆ There are some basic fact questions intermingled throughout
- ◆ Read the questions and options very carefully
- ◆ Be careful to think big picture
- ◆ Each multiple-choice question has only one right answer
- ◆ There are three distracters
- ◆ Beware of "none of the above" or "all the above" answers
- ◆ Beware of alternatives that are correct but have nothing to do with the question

**General test-taking stress-reducing tips:**

- Cramming causes anxiety
- Waiting until the last minute will always cause stress
- Stress reduces cognitive function and affects clear thinking
- Need to be sharp to distinguish subtle choices on test questions
- Studies show that if you eat breakfast before taking an exam, you will perform better
- When you get to the exam, take several deep breaths and consciously relax
- Know that you are in good company; most people taking the exam are stressed

**At the test center:**

- Read instructions carefully
- Do the tutorial / warm up
- Do the easy questions first
- Mark the difficult questions and return to them later
- Keep moving — do not get stuck
- Plan maximum time to be spent on each question
- Do not panic
- Read each question carefully! Read it again!
- If any doubt, go with first guess; be careful about changing answers on review; do not change answers unless you are positive you made a mistake the first time around
- Let language of the question be your clue — negatives or absolutes
- Watch for modifiers — read the question carefully
- Guessing will not hurt
  - Guess only if no other idea as to the correct answer
  - Points are given based on the number of correct answers; there is no penalty for guessing.

- Read all the alternatives
  - Alternatives with absolute or universal qualifiers (all, every, never, in no case, in every case, etc.) are usually wrong
  - Alternatives that seem impossible or that seem completely unrelated to the question are usually wrong
  - Watch out for alternatives that are true but have nothing to do with the question
  - If two or more alternatives say the same thing, both are probably wrong
  - There may be two distracters that are wrong, but not two correct answers to the same question
  - The answer to one question is sometimes found in another question
  - When three or more alternatives deal in different ways with one concept, one of them is usually right
  - If two answers contain a similar sounding word, such as “subordination” and “subrogation”, choose one of these
  - If two answers are almost identical except for a few words, choose one of these
  - If two answers seem extreme, they should be eliminated, and a guess made as to the remaining answers
  - If you are unable to eliminate any answer on a four-choice question, choose the third option (experience has shown that it has a better than 25% chance of being the correct answer)
  - Never argue with a question; accept it at face value!
  
- When all else fails
  - Choose the alternative that makes the most grammatically correct sentence, when added to the open-ended question
  - Look for a subject-verb agreement
  - Choose the longer answer.

Lastly, work on your weaknesses, but do not be obsessed with them. Focus on your strengths because this is where confidence will come from on test day. Imagine the feeling that success can bring. Do not wear yourself out cramming the day before. Dress comfortably for the exam and cut back on your caffeine.

And most of all, **GOOD LUCK!**

## VPO's 2012 ANNUAL MEETING AND CONFERENCE

On May 10, 2012, the VPO held its 2012 Annual Meeting and Conference at the Hampton Inn in Colchester. It was good to be back at the Hampton Inn again, and to meet new members and get caught up with long-time members. The CLE Committee asked attendees from each session if they would prepare a write-up of the highlights of each presentation. Here is what they had to say:



### ***Insurance 101 (Presenter: Jennifer Goeke, Liberty Mutual)***

The VPO's Annual Meeting attendees had the privilege of learning the "ins and outs" of home, life and auto insurance from Ms. Goeke. Her lecturing style emphasized real-life claims stories and was very effective in explaining what amounts and types of coverage are necessary. Flood insurance, for example, is almost never included in a standard home-insurance plan. Some VPO members present at the seminar experienced extensive damage to property from Hurricane Irene, and were devastated to discover they were not covered for flooding under their homeowner policy.

Ms. Goeke recommended different options for each area of insurance. She stressed the importance of having individual-life-insurance coverage, as opposed to group coverage, especially if the insured has children. She warned that it may

seem more financially appealing to pay less for minimal coverage on auto insurance. However, if one is in an accident involving someone with very low coverage, he or she will not be saving that money in the end. One of her most useful tips for home insurance, one that I utilized as soon as I returned home, was to videotape the interior of my home. I created a visual inventory of all personal property which is now kept in my desk at the office. In three short hours, Ms. Goeke gave an enlightening and comprehensive look at the world of insurance.

Contact information for Ms. Goeke can be found in the Liberty Mutual ad toward the end of this issue.

Gillian Osborne McKnight  
Law Offices of Jane Osborne McKnight, PLC



***Real Estate Update/E-filing of Transfer Tax Returns (Presenters: Andrew Mikell, Esq. / VT Dept. of Tax, Mike Piwowarski and Sherry Martin)***

I attended the VPO's 2012 Annual Meeting and Conference. My past experience with workshops offered at the VPO Annual Meetings have always been informative, positive and well-presented. This year was no different.

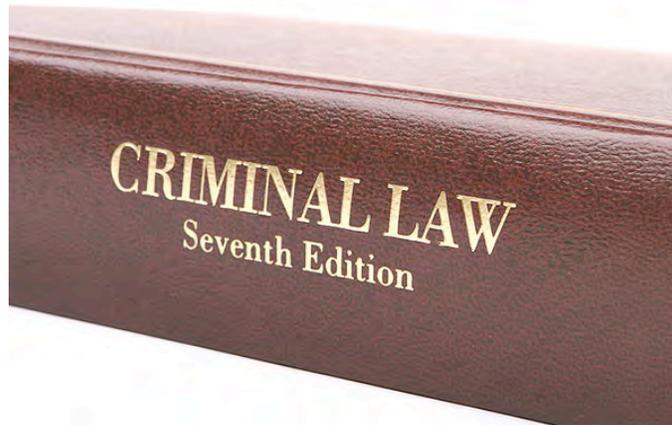
I am a relative "newbie" in the area of real estate. I gained limited practical experience in this area of law in my first paralegal position just out of college. What I learned back then is now largely outdated. That said, I was happy to sign up for the morning workshop of "Real Estate Update/Vermont Department of Taxes E-Filing Transfer Tax Returns."

Mike Piwowarski and Sherry Martin, both from the Vermont Department of Taxes, started us off with an overview of the benefits of e-filing Property Transfer Tax Returns (PTTR). When they asked the group who had already been filing their PTTR's electronically, a small number of hands went up. The majority, myself included, had not. Sherry Martin then led the group through a step-by-step tutorial of e-filing a PTTR, fielding questions all the way through.

Andy Mikell stepped up for the second half of the workshop presenting current developments in real estate law. His creative Power Point presentation provided a visual throughout our discussion of new legislation and case law on such topics as tax bill privacy law, current changes in foreclosure policies and procedures, and specificity in powers of attorney; e.g., what's covered; what's not. We talked about acknowledgements and their need to accurately reflect the transaction at hand, Enhanced Life Estate Deeds, sales of mobile and manufactured homes, and much, much more.

For someone who is just coming back to this area of law, I realized that I am at the steep end of the learning curve. I was hungry for information, and that is just what I got. I appreciate the experience and expertise shared by the presenters and from those in attendance.

Jayne M. Germain  
Law Office of George R. Vince, P.C.



***Criminal Law Update (Presenter: Paul J. Van de Graaf, Esq., assisted by Karen Arena-Leene)***

During the VPO Conference, I had the pleasure of attending the presentation by First Assistant and Criminal Chief Paul Van de Graaf, Esq. from the United States Attorney's office in Burlington. According to Attorney Van de Graaf, there are thirteen (13) prosecutors for the District of Vermont. Out of all of the cases that come in each year, about 40% are drug related, 10% fraud, 10% violence and crimes, 10% child exploitation and 30% other. The role of the U.S. Department of Justice in these matters is primarily investigative; thus, a competency in discovery rules is necessary.

Two important rules that Attorney Van de Graaf mentioned are: (1) Rule 16 of the Federal Rules of Criminal Procedure, and (2) Title 18 § 3500 of the United States Code, or as it is commonly referred to, the "Jencks Act." First, Fed.R.Crim.P. 16(a) obliges the government to disclose to the defendant the following: any relevant oral or written statements; organization defense(s); prior criminal record(s) of defendant; documents and objects including informative material to defense, evidence intended to be used at trial, and items obtained from or belonging to defendant; examination reports and test results (i.e. DNA, fingerprint or mental examination results); and summary of expert testimony. As Mr. Van de Graaf put it, "if we intend to use it, we have to disclose it." In Vermont, the government must provide the Rule 16 information within fourteen (14) days of arraignment; however, due to the nature of investigations, the government can only turn over what it has at that time, but updated information must be disclosed to defendant when the information becomes available. It is important to note that the defense has similar disclosure obligations as mentioned in Rule 16(b).

The second rule mentioned in Mr. Van de Graaf's presentation is 18 U.S.C. § 3500, or the Jencks Act. The Jencks Act sets the requirements and obligations for the government to turn over government witness statements after a government witness has testified. According to 18 U.S.C. § 3500(a), "No statement or report in the possession of the United States which was made by a Government witness or prospective Government witness (other than the defendant) shall be the subject of subpoena, discovery, or inspection until said witness has testified on direct examination in the trial of the case." The Jencks Act goes on to clearly define the term "statement" in subsection (e). Mr. Van de Graaf stated that summaries of witness interviews are not included in the scope of the term "statement" as defined in this rule, but that they still tend to disclose them.

Mr. Van de Graaf and Karen, his paralegal, ended the presentation by demonstrating the software they use to organize and maintain their criminal cases and to track discovery.

Laura E. Gorsky  
Law Office of David M. Sunshine, PC

**Legal Ethics - Case Studies (Presenter: Kerin E. Stackpole, Esq.)**

Playing by the Rules: Ethical Conduct for Paralegals

Andrea Spears and I attended this session at the 2012 Annual Meeting. The session was effectively presented with a refreshing touch of good humor by Attorney Stackpole, who spoke about Vermont Rules of Professional Conduct, and how they would also apply to paralegals. Attendees were given examples of questionable situations and asked to determine whether ethical conduct was compromised or violated. We were split into

groups to discuss each situation and to share our views and opinions. The situations used by Attorney Stackpole identified several common ethical conundrums we have all faced to some degree. She offered advice on how to handle yourself should you find yourself in a questionable situation as a paralegal, and also outlined ways to prevent the situations from happening.

This conference was our first VPO experience. We both found it to be interesting, informative and helpful professionally. We also enjoyed meeting

many of our peers for the first time. We look forward to attending future events and creating new connections with other paralegals in our community.

Marcy A. King and Andrea Spears  
Lynn, Lynn & Blackman

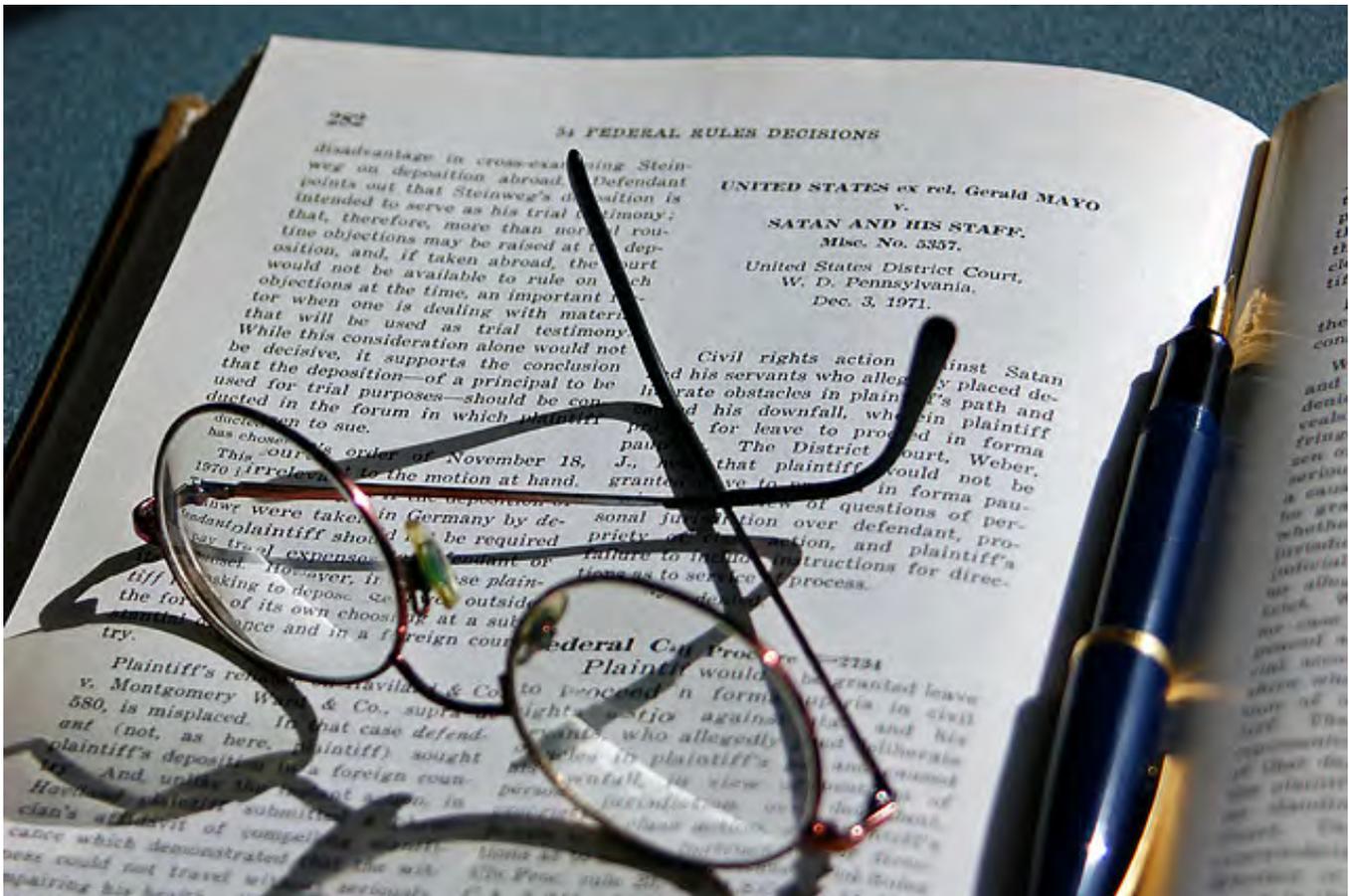
**Family Law Update (Presenter: Laura Bierley, Esq.,  
Legal Services Law Line of Vermont)**

Ms. Bierley presented an excellent overview of the changes to family law in Vermont since 2009. She discussed four cases and various statutes, and she identified the available online resources. This was my introduction to family law and it was very informative.

“Marriage is the legally recognized union of two people.” (15 V.S.A. §8) This definition had previously specified gender. The Military Parents’ Rights Act (15 V.S.A. §§681-689) has specified that military deployment alone does not meet the standard of a “real, substantial and unanticipated change in circumstances.” Ms. Bierley also highlighted the CourtFormPrep link on [vermontjudiciary.org](http://vermontjudiciary.org) (See Family Division Court – Family Division Forms) as an easy access to Family Division Forms. See also [vtlawhelp.org/forms](http://vtlawhelp.org/forms) and [LawHelpInteractive.org](http://LawHelpInteractive.org) for more on-line resources.

Audrey Holm-Hansen





### ***Legal Research and Writing (Presenter: Sophie Zdatny, Esq.)***

Ms. Zdatny presented on effective legal writing at the VPO Conference. Ms. Zdatny explained that legal writing establishes credibility with the court, provides the court with the controlling legal authority (research is key), and persuades the court to rule in your client's favor. She recommended proofreading, re-writing, and editing everything from emails to motions.

Ms. Zdatny emphasized eliminating typographical errors, avoiding errors in word choice (lien/lean, libel/liable), and rewriting with brevity as a goal. She gave some tips to unclutter legal writing:

- Use short sentences and paragraphs
- Write in plain English (choose the simplest word, avoid both legalese and Latin phrases)
- Use headings

Analysis of facts and application of rules are a paralegal's stock-in-trade. We can learn to transfer and apply these skill in editing our writing and selecting the most persuasive facts. Our emails, legal briefs, motions, and transactional documents reach a large audience — the client, court clerk, law clerk, opposing counsel, and judge. What impression do you hope to make on this audience?

Kenneth Nosek  
Paralegal Studies student, Champlain College

## Honorable Beth Robinson Associate Justice Vermont Supreme Court

By Julia Compagna, Paralegal Title Services, LLC



In October of 2011, Governor Peter Shumlin announced the appointment of Beth Robinson to serve on the Vermont Supreme Court, replacing retiring Justice Denise Johnson. Justice Robinson was the keynote speaker at the Vermont Paralegal Organization's Annual Meeting, held May 10, 2012 in Colchester. She kindly agreed to this interview for the benefit of those unable to attend.

*Julia: Please tell us about your educational and professional background.*

I graduated from Dartmouth College in 1986 and the University of Chicago Law School in 1989. I practiced in the law firm of Langrock, Sperry & Wool for 18 years (1993-2010), and served as counsel to Governor Shumlin for one year (2011) before Governor Shumlin appointed me to the Vermont Supreme Court as an Associate Justice on November 28, 2011.

*Julia: What people or events have shaped the professional you are today?*

I spent 18 years in private practice representing ordinary Vermonters confronting a range of challenges including divorce, workplace injury, employment issues, and a host of other issues. I also represented many lesbian, gay, bisexual and transgender individuals and couples in connection with civil-rights and family-recognition matters. Through this work, I came to appreciate the power and importance of the law in shaping the lives of ordinary Vermonters, as well as the limits of the law.

*Julia: What do you view as the greatest challenges facing Vermont's legal system?*

Like so many public- and private-sector institutions in these tough times, the courts need to continue to find ways to do more with less. The lawyers who practice in Vermont and the clients they represent face similar challenges. Collectively, we need to continue to work hard to find ways to resolve conflicts and deliver justice as efficiently and cost-effectively as possible.

## Region V Meeting Report

On May 19 and 20, 2012, Carie Tarte, Lisa Laramee and Diane Brown on behalf of the VPO attended the Region V meeting held in Clifton Park, New York, at the law firm of Bonnie McGuire Jones PLLC. Beth Bialis, the NFPA Region V Director, conducted the meeting with representatives from Capital District Paralegal Association, Central Connecticut Paralegal Association, Central Massachusetts Paralegal Association, Connecticut Association of Paralegals, Massachusetts Associations of Paralegals, New Haven County Paralegal Association, New York City Paralegal Association, Paralegal Association of New Hampshire, Paralegal Association of Rochester, Rhode Island Paralegal Association, Western Massachusetts Paralegal Association, Western New York City Association, and Vermont Paralegal Organization.

On Saturday, the group dove into the 2012 Spring Region Meeting Agenda by discussing various NFPA issues, the first of which was the Leadership Directory and the importance of having accurate email addresses for individual members. Beth reminded us that it is important for NFPA to have individual members' email addresses to allow for more direct communication to members in the form of email blasts. Beth also advised

us that individuals who move or switch firms can update their own information via the NFPA website, which was recently revamped.

We were reminded that associations need to send in their updated bylaws to Barb Peppersack so that she has a current set, especially if changes have been made to the bylaws, and submitted as part of the pre-convention procedures in order to have the local NFPA representatives present at the NFPA Annual Convention.

Beth went through the 2012 NFPA events starting with the Regulation/Leadership/PACE Conference hosted by the Middle Tennessee Paralegal Association on April 20-23, 2012, *Pro Bono* Conference Webinar held on March 29, 2012, via GoTo Meeting; Summer NFPA Board Meeting via telephone conference July 21-22, 2012; and the Annual Convention hosted by the Alaska Paralegal Association, September 27-30, 2012. Because the *Pro Bono* Conference Webinar was filled to capacity, it was suggested that it be expanded to give additional involvement by associations and their *Pro Bono* Committee.

Beth shared with the group that NFPA's annual conventions are scheduled at the following locations: 2013-Connecticut; 2014-Dallas, Texas; 2015-Hawaii, and 2016 is open for bidding at a location on the East Coast. Diane, Lisa, and I believe that Vermont would be a perfect location! The VPO Board is currently looking into the bidding process to determine if this is something that we can accomplish. If so, this is a very large commitment and will require the assistance of many VPO members. We will keep the membership apprised of this very exciting endeavor.

Beth encouraged associations to be more involved and serve on NFPA committees, reminding attendees that you do *not* have to be a board member of your local association to serve on a NFPA committee — anyone can serve on a NFPA committee. Beth mentioned that the following positions are up for election at the convention in Alaska: President, Vice President and Director of Positions and Issues, Vice President and Director of Paralegal Certification, Secretary and Director of Operations, and Education Coordinator. Each of these positions carry a two-year term. The group discussed those individuals who were interested in running for the positions, and Beth stated that she would be interested in continuing as the Region V Director, which has an unlimited term.

Beth also reminded us that NFPA has two Thomson-Reuters Student Scholarships available, one for \$2,000 and the other for \$3,000, as well as a one-time PCC examination scholarship. For the Thomson-Reuters Scholarship Application, go to:

[http://www.paralegals.org/associations/2270/files/2011content/2012\\_Thomson\\_Reuters\\_Scholarship\\_Application.pdf](http://www.paralegals.org/associations/2270/files/2011content/2012_Thomson_Reuters_Scholarship_Application.pdf).

Beth provided an update to the attendees about PACE and the PCC exam. She has recently passed PACE, and Jodi Estes has passed the PCC exam. We were told that a study manual will soon be released for the PCC exam, and that the online course for this exam will commence on June 4.

Beth provided the topics of the NFPA Winter Board Meeting: (1) Member get a member program; (2) Pro bono opportunities; (3) Student members; (4) Charting of issues and questions; and, (5) A special strategic alliance with the Notary Public Association.

Beth emphasized the opportunity of hosting a NFPA Board meeting or conference. In addition, she recommended the importance of communicating to members what the responsibility is as a Primary or Secondary Representative and as a Region Director. The Primary and Secondary representatives are liaisons between members and the Region Director and NFPA, and the Region Director is the liaison to the NFPA Board. It is important that representatives report back to their members about current issues.

Beth shared several reminders with the group, including the following:

- Remind associations to submit their Form 990 to the IRS;
- Remind the Primary and Secondary representatives that they can summarize the Inside Report and prepare articles for local associations newsletters;
- Remind associations to send in their newsletters for posting on the NFPA website;
- Remind associations that they should report all pro bono activities to the ABA Liaison for inclusion in the regular report to the ABA (i.e., this is vital for the ABA/NFPA relationship);
- Remind associations that NFPA's Pro Bono Committee is setting up a Pro Bono Mentoring System that will provide assistance to the associations that do not have pro bono programs; and,
- Remind associations to sign a current licensing agreement for the use of the logos/trademarks of PACE, PCC, and NFPA on websites, newsletters and other communication tools.

The associations also discussed many issues, including the effectiveness of list serves, updates on regulation within Region V, leadership training, having the Region V Director come to a local association every two years, attracting student members, military membership, policies and procedures manuals, and mentoring new members in local associations. The entire day was filled with great discussions and information that the three of us found most helpful, as well as several items that we will share with our VPO Board and membership.

On Sunday, we returned to the meeting and Beth led the discussion about agenda topics for the NFPA Annual Convention. The group felt that it would be most useful to have a future training session on how to write an agenda topic. Shaun Pilcher of the Massachusetts Association of Paralegals introduced an agenda topic submitted by the Pittsburgh Paralegal Association involving the expansion of the eligibility requirement for PACE to include a bachelor's degree in legal or paralegal studies or a master's degree in legal or paralegal studies. There was much discussion about this issue and Shaun had the task of going back to rewrite the agenda topic. In addition to this agenda topic, we discussed two other important agenda topics concerning a change to PACE to expand upon eligibility. The first proposed change is that if the PCC exam is taken and passed, you should be able to take PACE automatically. The second proposed change is to change the current 30-day notice to member associations of the agenda topics to providing a 60-day notice to allow associations to share agenda topics with their members for consideration.

The group discussed various other issues including ideas for generating non-dues income, job bank (i.e., employment opportunities), mentoring program, social media, brown-bag seminars, professional liaisons, code of ethics, dissolution provision in bylaws, websites, emails to members, and donations to state employees.

Overall, we enjoyed the meeting and felt it was very productive. The meeting was certainly a great forum for networking and working together as a region to share experiences, information and ideas. We are compiling a list of those action items that need attention by the VPO, and we look forward to sharing them with you in the near future.

Carie Tarte, President  
Diane Brown, NFPA Secondary

## Community Service - Salvation Army

On March 6, 2012, Carie Tarte, Diane Brown, Corinne Deering, RP®, Kristin Mattes, and Leslie Mooney served a warm meal to about 60 people from the Burlington area at the Salvation Army. Diane and Carie graciously accepted mops and helped to clean the floors. Carie went above and beyond and even mopped the men's room. Thank you, ladies!



On April 10, 2012, Evelyn Wetzel, Mary Tino, Corinne Deering, RP®, and Kristin Mattes served a warm meal to dozens from the Burlington area at the Salvation Army. The guests are always grateful for the warm meal and smiling faces.

On May 14, 2012, Evelyn Wetzel, Lisa Laramee, Louise Reese, Leslie Mooney, Leslie Anderson, and Diane Brown served a warm meal to about 55 people at the Salvation Army. With all the help we had that evening, including Leslie Anderson on dish duty, we had time to mop the floors again, which Leslie M, Evelyn, and Lisa performed with great skill. Did I mention that we also had a great deal of fun? It was not only a pleasure to see our paralegal friends again, but we also enjoyed providing a hearty meal to members of the local community.





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# Vermont Paralegal Organization

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