

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
PRESIDENT**

**JOB DESCRIPTION**

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1. Supervise and control all business of the corporation.  
(including collection and distribution of incoming mail)
2. Preside at all meetings of the members and the board.
3. Sign checks.
4. Non-voting member of all committees, except elections and nominating committees. A voting member of the membership committee.
5. Representation of the organization at any membership/regional meeting/local bar association meetings.
6. Calls Emergency Board (E-Board) sessions whenever deemed necessary. Members of the E-Board are the President, Vice President, Secretary, and Treasurer. Should any of the officers be unavailable at the time the E-Board is called into session, the President can appoint a regular Board member to act in their place.
7. To make sure that PNPA is accurately represented.
8. Together with Vice President, prepare board packets; including agenda, commitment chart, reports, etc. prior to each board meeting.
9. Submit monthly articles for the newsletter.
10. To assist Regional Directors, Coordinators, and Chairs in obtaining necessary information/documentation for PNPA members.
11. The President shall be consulted on any question involving actions by a committee that are not specifically addressed by the Bylaws or Standing Rules of PNPA.
12. Shall serve as a member of the Budget Committee.
13. Shall serve as a member of the Bylaws Committee.
14. Shall serves (or shall have their delegate serve) as chair of the Retreat Committee.

15. Shall approve all items prepared, whether verbal or written, for dissemination in any form other than PNPA's newsletter or similar notice, and purporting to represent the position of PNPA
16. Encourages Board's role in strategic planning.
17. Appoints the chairpersons of committees, in consultation with other Board members.
18. Serves *ex officio* as a member of committees and attends their meetings.
19. Helps guide and mediate Board actions with respect to organization priorities and governance concerns.
20. Monitors financial planning and financial reports.
21. Performs other responsibilities assigned by the Board.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
VICE PRESIDENT**

**JOB DESCRIPTION**

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1. In the absence of the president or in the event of the president's death, inability, or refusal to act, perform the duties of the president.
2. Serves on E-Board for emergency decisions.
3. Sign checks.
4. Reports to the Board's chair.
5. Shall perform such other duties as may be assigned by the President or the Board.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
SECRETARY**

**JOB DESCRIPTION**

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1. Attend and prepare the minutes for all board and statewide membership meetings. Provides a copy of Minutes of any said meeting to the President within ten days of such meeting.
2. Maintain the corporate books and records of the board, and ensures effective management of the organization's records.
3. Sign checks.
4. Maintains a correspondence file for any pertinent matters.
5. Maintains an index of Board decisions/resolutions.
6. Maintains PNPA calendar of events.
7. Shall perform such other duties as may be assigned by the President or the Board.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
TREASURER**

**JOB DESCRIPTION**

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1. Shall have charge and custody of and be responsible for all funds and securities of PNPA.
2. Shall keep full and accurate accounts of monies due and payable to PNPA from any source, and deposit such monies in the name of PNPA in such depositories as shall be designated by the Board.
3. Shall account to the Board and membership for all financial transactions of PNPA, including reports of the financial condition of PNPA.
4. Shall (or their delegate shall) keep a current roster of the membership.
5. Shall (or their delegate shall) report the membership annually to NALA with the NANA renewal fee for continued affiliation.
6. Shall perform such other duties as may be assigned by the President or the Board.

- OBJECTIVE:
1. Financial Planning. Determine financial requirements of PNPA programs and projects, and identify financial resources available to meet goals and objectives.
  2. Financial Management. Receive, record and make timely deposit fees, dues and other payments to PNPA accounts; make timely payment of program and project expenses to vendors, and reimbursements to members in accordance with board-approved budgets.
  3. Financial Oversight. Provide financial oversight of programs and projects, making regular accounting of receipts and expenditures.

- METHOD:
1. Financial Planning
    - (A) Attend all board planning meetings and board retreat. Correspond with officers, board and committee chairs on a continual basis concerning financial objectives.

- (B) Solicit program and project financial requirements from officers, board and appropriate directors prior to June 1 of each year.
- (C) Ensures development and board review of financial policies and procedures.
- (D) Chair Budget Committee:
  - (1) Serves as chair.
  - (2) Prepare proposed program and project expense budgets for approval prior to July 1 of each year.
  - (3) Recommend class fee structure, membership dues and other funding strategies to board prior to July 1 of each year.
  - (3) Prepare six month and twelve month financial projections and approved program/project budgets upon board approval.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
LIAISON**

**JOB DESCRIPTION**

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1. Be a member of the National Association of Legal Assistants (“NALA”).
2. Be familiar with the NALA bylaws and standing rules.
3. Provide NALA board meeting minutes to PNPA’s board.
4. Represent PNPA at the NALA annual meeting. Prepare a written report for the annual meeting (and mid-year meeting, if attended) for PNPA’s next board meeting and prepare a report for the PNPA Newsletter.
5. Report quarterly to NALA regarding PNPA’s educational activities on forms provided by NALA. Annual Report with summary of the year’s activities and officer’s names is due June 1. The annual report will be entered in the minutes of the Annual Meeting.
6. Submit items for discussion to NALA (at the annual meeting or the mid-year meeting) as requested by the PNPA board.
7. Participate in discussion sessions at the NALA annual meeting at the annual and mid-year meetings (with affiliate organizations).
8. Notify the NALA parliamentarian of any changes in PNPA bylaws within 60 days of passage.
9. Report regularly to your membership on NALA events, legislative changes affecting the profession and any other matters of importance communicated to your association from NALA (by means of Facts & Findings, newsletters, program brochures, news releases).
10. Prepare and submit the Designated Voting Representative form due each year prior to the NALA Annual meeting. Each association must designate its voting representative, in person or by proxy, by July 1 of each year.
11. Notify NALA in writing of any change of officers of your association.
12. Verify with our association’s treasurer that the NALA Annual Affiliated Association renewal fee has been paid. The deadline is October 1.
13. Distribute NALA press releases to newspapers, bar journals and business journals in your area.

14. Shall serve for a two-year term.
15. Shall perform such other duties as may be assigned by the President or the Board.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
REGIONAL DIRECTOR**

**JOB DESCRIPTION**

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1. Shall be assigned to the region which that director serves.
2. Represents the region at all Board and membership meetings.
3. Disseminates information provided by the Board and NALA to members in their region.
4. Responsible for organizing membership meeting within the designated region.
5. Works with PNPA to provide educational events.
6. Conduct at least one membership drive each fiscal year.
7. Maintains communication with regional members.
8. Performs any other duties assigned by the President of the Board.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
ASSOCIATE DIRECTOR**

**JOB DESCRIPTION**

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1. Be in contact with all associate members and bring their concerns to the board.
2. Encourage associate members to become regular members in PNPA if they qualify for regular membership.
3. The Associate Membership Director will have one vote on the board and thereby represent all associate members.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
MEMBERSHIP COORDINATOR**

**JOB DESCRIPTION**

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OBJECTIVE	Oversees all membership activities in all Regions. Works with any Regional Membership Committee chair or Regional Director in meeting the needs of PNPA members.
INQUIRIES	When an inquiry regarding membership is received, send a form letter with information about PNPA and enclose a copy of PNPA Guidelines, a CLA Exam Information sheet, Benefit of Membership sheet, our history and an application for membership. Maintain a list of interested persons. (Form letter available on disk.)
APPLICATION	<ol style="list-style-type: none"><li>1. When an application is received, the treasurer retains the check and send the application to the Membership Director.</li><li>2. Send the applicant a letter telling them that their application has been received and that their name will be published in the next newsletter. Form letter available on disc.</li><li>3. Once the name has been published and an appropriate time has passed for responses, send another form letter congratulating them on their membership and include a copy of the Bylaws and current roster, and a membership card (“packet contents”). Present waiver requests to Board.</li></ol>
CLE CREDITS	During fiscal renewal period, verify CLE requirements. If there is a problem, write the person indicating the problem and work with them to try to remedy it. If no problem exists, send a new membership card for that fiscal year.
ROSTER	<ol style="list-style-type: none"><li>1. Keep the membership roster current and provide copies for Board members on a quarterly basis.</li><li>2. Publish the roster twice a year.</li></ol>

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
EDUCATION COORDINATOR**

**JOB DESCRIPTION**

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OBJECTIVE	To oversee the educational programs and seminars of the organization.
METHOD	<ol style="list-style-type: none"><li>1. To assist Regional Directors and Regional Education Committees.</li><li>2. Provide Regional Directors and Committee Chairs with educational materials, including education and seminar information from NALA. (Education Binders/Leadership Manuals were provided to the Regional Directors in 1992—make sure these are turned over to new Directors and/or Education Chairs of each Region or provide them with new materials.)</li><li>3. Develop and maintain Oregon substantive curriculum.</li><li>4. Conform the policies and procedures for education planning in each region.</li><li>5. Research and be aware of legal assistant or related legal programs offered on a college level.</li><li>6. Contact and encourage facilities offering legal assistant and related studies to offer a curriculum consistent with the requirements to for NALA's CLE examination and to utilize our members as consultants and instructors.</li><li>7. Promote programs that educate our members, attorneys, and the public about the proper utilization of legal assistants.</li><li>8. Review and approve all education and seminar related budgets and submit copies of budgets to the treasurer.</li><li>9. Responsible for ordering and/or returning all textbooks for educational classes sponsored by PNPA.</li></ol>

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
REGIONAL EDUCATION DIRECTOR  
(Committee Chair)**

**JOB DESCRIPTION**

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OBJECTIVE	To determine the educational needs for the legal assistants in your region; set up and coordinate the educational programs.
METHOD	<ol style="list-style-type: none"><li>1. Determine the best person to teach the program and contact that person to make arrangements for the date, time and fees. When possible, see if the educator will contribute his/his time.</li><li>2. Find a location for the class and make arrangements for date and time.</li><li>3. When appropriate, order any books or materials for the class.</li><li>4. Create a mailing list for your region and prepare a flyer about the upcoming class. Mail to those on your list about two weeks before the class.</li><li>5. Send a confirmation letter to the educator regarding the class, date and time.</li><li>6. Collect the registration forms and money sent by those taking the class. Be prepared to collect money at the class.</li><li>7. On the date of the class, introduce the speaker and, if possible, have those taking the class introduce themselves.</li><li>8. Have PNPA and CLA verification forms properly filled out and signed for disbursement at the end of the class.</li><li>9. Send a letter of thanks to the educator along with a check for his/her fees or a gift where appropriate.</li><li>10. Keep track of the registrations and money taken in as well as your costs. Send a summary and receipts to the treasurer for deposit and reimbursement.</li></ol>
FINANCES	PNPA can pay each educator a fee of \$30 per hour. You may offer this fee when arranging your educator, but if he/she says they will contribute their time without cost, accept. This will keep the cost

of the class to a minimum. For those who donate their time to teach the class, a gift in amount not to exceed \$10 is appropriate.

To determine the appropriate cost to those taking the class, total the costs for copying, postage, books and fees or a gift. Divide this figure by the estimated number of people who will attend the class (10 is usually a safe average) to determine the cost of your class. Use your judgment to determine if the cost is either too high or too low and adjust accordingly.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
AUDIT COMMITTEE**

**JOB DESCRIPTION**

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1. Oversee the activities of the treasurer.
2. Be responsible for the annual audit which includes a review of the books and a letter from the audit chair outlining his/her results of the audit. The letter should be read, signed and approved by all board members serving at the time of the books in question.
3. The treasurer cannot sit on the committee auditing his/her books.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
BYLAWS COMMITTEE**

**JOB DESCRIPTION**

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1. Comprised of the President and Parliamentarian.
2. Oversee the drafting and/or revisions of all Bylaws and Standing Rules of the organization.
3. The Bylaws Committee Chair oversees the committee and the maintenance of the Bylaws, and Standing Rules.
4. Follows procedures for NALA approval.
5. Submits all proposed Bylaws/Standing Rules to the Board for approval; to the NALA Parliamentarian through the NALA Liaison if the Bylaws Committee Chair is not a member of NALA.
6. Submit a summary of the amendments to the Bylaws, and the deadline date for filing any objections thereto, to the Newsletter Committee for publication.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
NEWSLETTER EDITOR**

**JOB DESCRIPTION**

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1. Publish online newsletter in January, March, May, July, September and November. Additional publications may be requested.
2. In addition to publishing Hearsay, there will be the option of interim one-page news statements of any pertinent news from the president and/or NALA Liaison. This online posting can be done by the editor, president or NALA Liaison.
3. The newsletter editor can use the membership roster (done twice a year by the Membership Coordinator: in September (to include all changes and additions of membership renewals in July) and in March) to publish the names of new PNPA members in the newsletter.
4. Solicit articles from PNPA members and other sources. These should be informative articles, as well as career profiles/bios of members.
5. Brief bios of the board members will be published once a year immediately after the new board elections.
6. PNPA's intent is to provide a newsletter with educational material and law related articles of interest in our profession.
7. The editor may use members of the Newsletter Committee to assist in soliciting advertising; company articles; and assist in the production, publication, and distribution of the newsletter.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
CLA COORDINATOR**

**JOB DESCRIPTION**

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1. Must be a CLA
2. The CLA Coordinator will work directly with the NALA Liaison and oversee all CLA activities of the organization.
3. Organize the annual CLA Satellite Seminars.
4. Prepare a proposed budget along with a report for the treasurer.
5. Sign all requests for disbursement/checks.
6. Prepare for CLA Seminars:
  - a) Contact each Regional Director and coordinate a site where the seminar will be held (keeping in mind sites which are free for the use in order to keep the cost of the seminar down), also coordinate meals/refreshments in to prepare seminar budgets. It is important to ascertain early on if a Regional Director or CLA Committee Chair will require a check for expenses in advance to avoid out-of-pocket expenses.
  - b) Prepare the flyer, making certain all mailing lists are updated for use, and mail the flyer. All registrations being sent directly to the CLA Coordinator.
  - c) Contact all speakers for all locations of the seminars. All speakers should either be CLAs, CLASs, or someone who has already sat for the CLA Exam and is presently in the re-take status.
  - d) Contact Regional Directors to advise of registrants, sending them a copy of the registration list at least three days prior to the seminar date.
  - e) Order all NALA materials (Mock Exams, brochures, etc.) and deliver to each Region no later than one week prior to the seminar.
7. Once the CLA Seminars have been held, the Coordinator needs to follow up with each Regional Director to see that study groups are formed. Any guidance and materials necessary must be supplied to all study groups.

8. **July 1 of each year:** Coordinator contacts all seminar attendees and/or study group participants re: registration for PNPA membership to sit for the CLA Exam offered in December. **Remember the testing site offered in December is always offered by Affiliate Associations of NALA and participants must be members of the Affiliate Association in order to sit for the exam at this time.**
9. **August of each year:** It is the responsibility of the NALA Liaison to request a testing site each year from NALA.; however, the CLA Coordinator should discuss this with the NALA Liaison and make certain this has been done no later than August 31 of each year.
10. **September 1 of each year:** Contact participants re: applications to NALA to sit for the CLA exam in December. The Coordinator should coordinate all registrations/applications to ensure that proof of membership to PNPA is included before sending to NALA.

**PACIFIC NORTHWEST PARALEGAL ASSOCIATION  
PARLIAMENTARIAN**

**JOB DESCRIPTION**

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The Parliamentarian is appointed by the Board, and attends all meetings of the Board and membership. The parliamentarian gives opinions of parliamentary procedures upon request of the presiding officer at those meetings, and performs such other duties as assigned by the President or Board.

The Parliamentarian must be familiar with the Bylaws of PNPA and NALA.

The Parliamentarian is an advisor: the position is not one of power. The Parliamentarian advises the President and the President rules on the procedure. If the Parliamentarian is a member of the organization and sits by the President, the Parliamentarian is not entitled to make or discuss motions, or vote on them; however, he or she may vote in a ballot vote. The Parliamentarian is supposedly impartial. If the Parliamentarian is attending a meeting, but not “advising” the President, he or she may take part in discussions and vote.