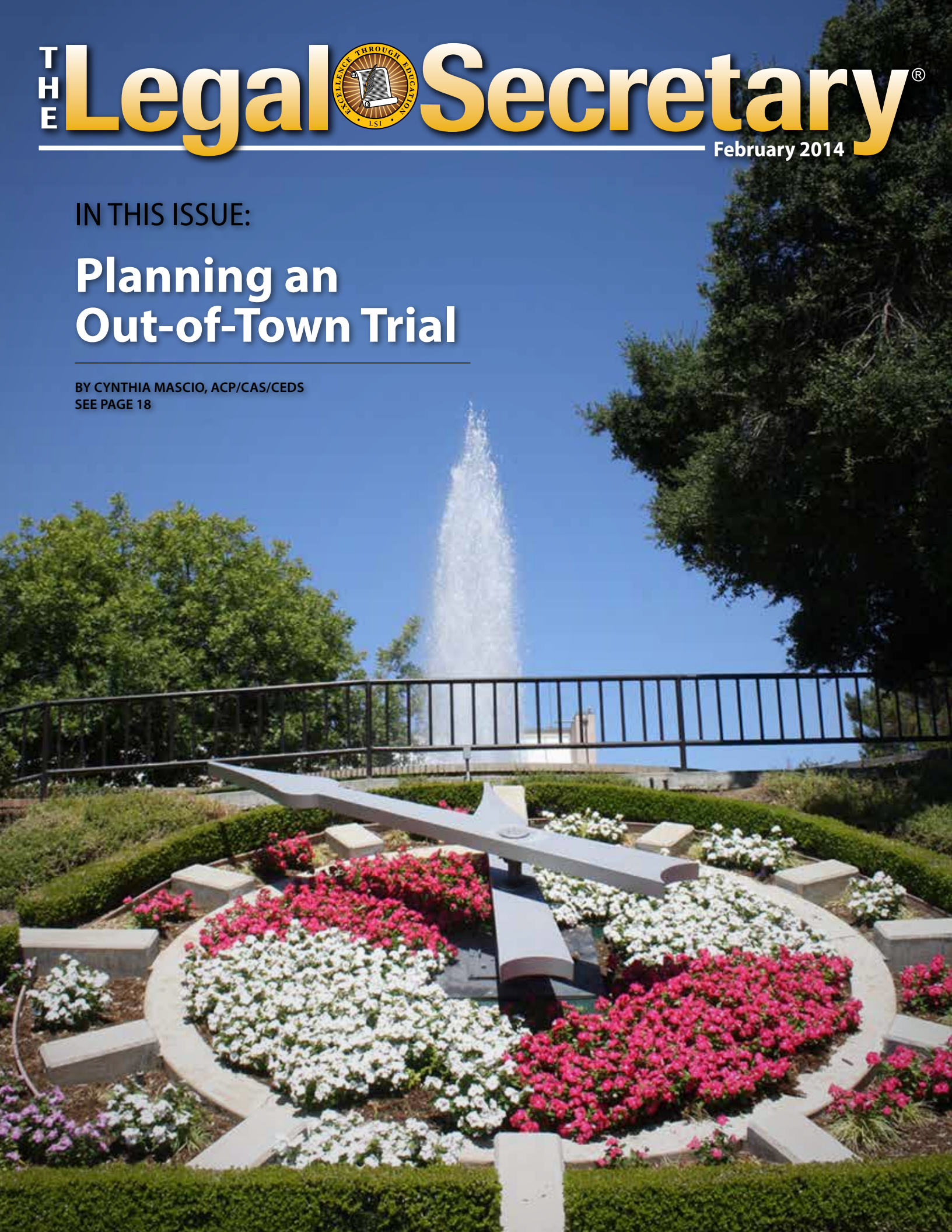




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Planning an Out-of-Town Trial

BY CYNTHIA MASCIO, ACP/CAS/CEDS
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Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

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Rise To The Challenge

BY SANDRA T. JIMENEZ, CCLS — LSI PRESIDENT



Happy New Year 2014! Everyone knows the quote “time flies when you are having fun.” Well, time is certainly flying, so we must be having fun!



SANDRA T. JIMENEZ

is currently self-employed as a Legal Temp/Notary Public. Previously she was employed with the County of Imperial, Department of Social Services. Prior to that she was employed with law firms specializing in civil litigation, employment law, real estate transactions, collections, bankruptcy, and probate in El Centro for the last 30 years. Sandra was awarded the Legal Professional of the Year 2012 award by the Imperial County Bar Association in June 2012.

Now that the holidays have come and gone, it is time to focus on what the new year will bring for LSI. Whether positive or not, I believe that we are all ready to “rise” to whatever challenges come our way. LSI has an active and strong team this year, which consists of the Executive Committee, the Chairmen, and the Governors, and there is nothing that we can’t accomplish together. I commend the governors for their professionalism at meetings and for taking their voting responsibility seriously. Together we have accomplished much in the last year; however, we must continue to “put our shoulder to the wheel” and push ahead. Let’s continue to **Rise to the Challenge** together and move LSI forward.

NOVEMBER 2013 CONFERENCE – RECAP AND ACKNOWLEDGMENT:

Our special thanks to LONG BEACH LPA for hosting a fun November 2013 Conference! Another great conference! I believe that many will agree that the view of the bay was absolutely magnificent. It was truly “A Survivors’ Mayan Adventure” weekend. The Maya Hotel, with its Central American décor, was the perfect location with its relaxing atmosphere, and our stay was truly enjoyed by everyone who attended.

We salute and commend Cathleen Siler, Conference Chair, and the Long Beach LPA committee for planning a wonderful and educational “Mayan” weekend. The food was excellent and the hotel staff and service were absolutely fantastic. The Saturday evening entertainment (Maya Indian Dance Group) was delightful and very entertaining – I got tired just watching them dance, where do they get all their energy?

Many LSI Past Presidents were in attendance: Patricia S. Brady, PLS, CCLS, Esq.; Patricia A. Parson; Linda Duarte; Patricia E. Miller, PLS, CCLS; Yvonne Waldron-Robinson, CCLS; Kay J. Thornburg; Christa Davis; and Brooke Mansfield, CCLS. It is great to see that some past presidents are coming back representing their associations as Governors – their dedication and commitment is truly commendable.

Also in attendance were two honorary members: Sharon Irish, CCLS, and Donald F. Lee (Mr. Hospitality), Member of Merced County LPA. We truly appreciate their attendance and continued support at LSI conferences.

All of the officers and chairmen are diligently working and everyone can attest to all of their accomplishments. The following is a short synopsis of the work in progress:

- Linda Duarte, LSI Executive Advisor, will be sending out a Nominations and Elections request letter soon. If you are interested in becoming an officer of LSI, please submit your nominations timely. Who will be the next LSI Treasurer?

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PRESIDENT'S MESSAGE

Continued from page 2

- Terrie Quinton, CCLS, has done an awesome job as CCLS Chair. LSI's CCLS online study group has proven to be very successful. We received \$3,500 in revenue! From the 39 who took the class, 19 sat for the CCLS exam and 10 of those passed! The governors voted unanimously and approved another class in January 2014; participants were already signing up for the next class at conference. Cost of the class: \$100 for members, \$125 for non-LSI members, \$50 for members repeating class, and \$75 for non-LSI members repeating class. Expect to hear more on this at the February Conference and expect a large turnout of those who passed at the May Annual CCLS luncheon – to date, we have 19 new CCLSs!
 - Our Legal Secretarial Training Chair, Shaylene Cortez, CCLS, has also put a lot of time and effort in preparing for the Beginning Legal Secretarial Training online class, which will commence on January 6, 2014. *The Legal Secretary's Reference Guide* will be used for the class. Expect to hear positive results in her report at the February Conference. The governors unanimously approved the commencement of this class. The cost for the class is \$150 for members, \$200 for non-LSI members.
 - Michelle Tice, CCLS, Editor of *The Legal Secretary* magazine, continues to improve the magazine. LSI received many positive compliments on the November 2013 issue.
 - Our Parliamentarian, Astrid B. Watterson, CCLS, has completed the task of updating information on the Bylaws and Standing Rules for all local associations and is now in the process of working one-on-one with each local association.
 - The 2013-2014 Eula Mae Jett Scholarship Plan of Administration was again updated by Sylvia Marsh, LSI Scholarship chair, and the governors approved and adopted the revised Plan. Scholarship applicants must be residents of California and must be enrolled in a California educational institution to qualify -- or forfeit scholarship.
 - Our Legal Procedure chair, Jeffrey Weddle, has been very busy. He reported 85 posts with many more on the way. This information is indeed helpful to all members.
 - The Continuing Education Council (CEC) will present its last free seminar for the 2013-2014 fiscal year at the February 2014 Quarterly Conference. I urge everyone to take advantage of this free seminar, they are always so informative. The CEC also announced that final plans are underway for the Day of Education planned for April 12, 2014, in Ontario, California. Save the date!
 - Cheryl Kent, PLS, CCLS, Legal Specialization Sections (LSS) Coordinator, and the leaders received rave reviews on the November LSS seminars. They have scheduled great seminars also for February (e.g., Protecting Assets from Medical Recovery, Advanced Discovery Withhold- ing Documents, Gang Suppression, Health Safety & Risk Management, Pre-Nuptial vs. Post-Nuptial Agreements, and Bankruptcy). It is never too late to sign up for membership in LSS!
 - Maria Bishop, CCLS, Editor in Chief, reported a minor financial setback in returns on the Legal Professionals Handbook in the past quarter; however, the Publications Revision Committee (PRC) is still on track on the upcoming revisions. Maria is doing a wonderful job with our attorney, Frank Blundo, Esq., in ongoing negotiations with The Rutter Group to update our LPH and LOPM contracts and it is expected that the contracts will be finalized before the end of the 2013-2014 year.
 - Lynne Koroush, CCLS, Professional Liaison/Day in Court Chair, reported many associations have had or have scheduled local events this year. Check out the LSI website for the scoop on upcoming scheduled events.
 - Margaret Tovar, CCLS, Liaison to the Law Practice Management & Technology Section of the State Bar of California, reported on the new MCLE changes coming up in July 2014. She also informed LSI members that the State Bar of California has a new President, Luis J. Rodriguez of Los Angeles. LSI did send a congratulatory card to Mr. Rodriguez.
 - Cristina Reynosa, Advertising Chair, is working very hard at attempting to find advertisers for *The Legal Secretary* magazine and for the LSI website. Some advertisers are not renewing their ads with LSI because it is no longer cost-effective. Why? It might be that members are not clicking on their ads or using their services. Please support our advertisers whenever possible. Additionally, if you send an advertiser referral to the Advertising Chair, you receive chapter achievement points!
 - Linda Gubba-Reiner, CCLS, Social Media Chair, is busy keeping all of the pages on our website current. If you see information that needs to be updated, please contact her.
- Aside from adopting the revised 2013-2014 Scholarship Plan, continuing the CCLS online class and approving the registration fees, and approving the commencement of the Legal Secretarial Training online class and registration fees, the governors voted and approved the following Executive Committee recommendations:

AMEND LSI STANDING RULES:

33.1- An amendment to the Standing Rules requires a majority vote of the votes cast after quorum has been met.

2.15.1 and 3.15.1 - The due dates of written reports of LSI Officers, Appointed Officers, and Chairmen are listed

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LONG BEACH, CA NOVEMBER 15-17, 2013

LSI Quarterly Conference





LINDA DUARTE,

LSI EXECUTIVE ADVISOR

Many of you are familiar with Linda Duarte, LSI's Executive Advisor and past president from 1994-1996. Linda is fun to talk to, has a jolly laugh, smiles all the time, and I'm delighted to share her interview with you.

Linda did not attend a four year college, but she did graduate from a Junior College in Santa Maria. After working for attorneys for quite a few years, she was asked to teach at that same Junior College, but in order for Linda to become an instructor, she had to take a special class which allowed her to obtain a teaching credential from the State of California. Teaching, says Linda, "was a lot of fun and rewarding."

Linda decided to become a legal staff member in the 1970s when she was going through a divorce. During that time, she and her daughter moved back home to Santa Maria and lived with Linda's parents. At that time, she signed up for unemployment and was immediately contacted by an attorney who was looking for someone he could train as a legal secretary so of course, she jumped at the opportunity and ended up working several years with him. He was the one that encouraged Linda to join the Santa Maria Legal Secretaries Association. While she enjoyed her membership in the association and learned a lot, it was also when she decided that she wanted to work in the legal field. And when her daughter Lisa was older, she decided that she and Linda should move to a big city, which sounded ok to Linda at the time. While exploring the legal industry, she was contacted by Cheryl Woodson who convinced Linda to move to Long Beach because they really needed legal secretaries. Cheryl gave Linda some names of good firms and she mailed her resume to numerous law offices. Within three days, she had a response from each of the law offices she contacted and all of them wanted Linda to interview for a position, which she did. The rest is history and Linda and her

daughter are still living in Long Beach.

Besides her daughter, Linda is a very proud grandparent. Linda and Lisa look forward to the weekends when they can drive down America's Finest City, San Diego, where her granddaughter, Hannah (who signed with University of California at San Diego) plays on the Tritons girls' softball team. Hannah is also a two-time CIF female student Athlete of the Year as a junior and senior with the Bruins (2011-12), named All-Moore League First Team as a sophomore (2010) and senior (2012) at WHS. The Bruins were Moore League Champions in her senior year (2012) and Hannah also played for the USA Athletics 18 Gold team (2009-12). This year she is their lead pitcher and is doing very well AND, still maintains all A's in her classes. So YES ... Linda is a proud grandma!

When I asked Linda how LSI is different from when she was President, one thing that stands out is that LSI has gone totally paperless - sometimes she thinks it is a great idea and other times, she feels that it puts too much pressure on the members and governors. "A lot of members cannot use their computers at work to take care of LSI matters and some don't even have a computer at home which makes it hard if a member wants to be a chairman," says Linda.

The legal field today is quite different than it was when Linda started. One major difference is the technology and equipment used today compared to several decades ago, when computers were more of a luxury item than a work necessity. "You either were a very accurate typist or you would end up typing all day long on one project (I was a good typist)," said Linda. Another major difference is that the legal



secretaries associations and the bar associations were always putting on events together.

Sadly, that is not done so much anymore. Also, the new attorneys would rely A LOT on their legal secretary compared to today when some attorneys would rather prepare pleadings themselves on the computer. And we all know what happens when attorneys type their own papers...

In her spare time, Linda enjoys reading and/or trying out new menus, which she now has the time to do more of, so next time you need a test taster, Linda is your girl. Not to mention that ice cream is her favorite dessert.

When Linda retired, she always thought she would be able to sleep in, but another member of her household, her granddaughter's dog, feels differently. Now that Hannah is away at college, the dog thinks he should wake her up at 5 am for a walk. Of course after she is up, she usually stays up. It lets her get the housework done early which will help when she starts volunteering somewhere. Wait ... serving on LSI's Executive Committee is a volunteer job! So I'll end this interview by thanking you, Linda, for all you do and have done over the years for LSI!

PATRICIA A. PARSON,

LSI Past President 1988-1990

“Pat,” as many of you know, is one our Past Presidents and still attends many, many LSI conferences, always has a kind word and has a vibrant smile.

When Pat was in high school two FBI agents came to speak to the senior class about working for the Bureau. Anyone in the class who wanted to apply for the job was given a day off school. Needless to say, everyone applied. Pat was one of five from her class who went to work for the FBI. It was a great experience, but the work was in a “steno pool” so she never answered phones, did an envelope, etc. When she made a career change she interviewed at a three-attorney firm. Two of the attorneys said “no” since she had no office experience. Fortunately, the third attorney had been an FBI agent. He said, “Hire her. If she’s worked for the FBI, she knows how to work.” Working for the FBI did have its drawbacks for a single person. Pat’s father was an Oakland Policeman and her brother was a San Leandro Policeman and she worked for the FBI ... needless to say, it scared a lot of dates away!

As a newlywed, Pat’s then husband was stationed in San Diego for four years. She worked for Pat Crowell at Gray, Cary, Ames & Frye. (All four partners were alive when she worked there!) She met Rhoda Spencer then and their paths crossed several years later at a LSI meeting.

When Pat’s marriage ended and her home sold, she bought a condominium in Castro Valley, where she presently lives. She also owns a cabin in the Sierra Foothills which is about two hours from home. It is the place to relax and have fun. Several LSI members have been there both for meetings and for fun weekends. Pat has no children, but has lots of nieces and nephews who she loves to visit and spoil. Some live in Reno and some in Las Vegas, so she has a good time whenever

she sees them. She has taken cruises with one niece and gone on trips with most of them. She has so much fun with them, they affectionately call her “Auntie Mame.” One nephew said, “don’t try to keep up with Auntie Pat—she will always win.”

Pat joined Alameda County LSA (“ACLSA”) in 1970-71 (when a friend of friend was President) after attending one of its meetings where she was warmly received. The first year she was asked to be employment chair (and at one time there was a state chair as well), and the next year she was asked to be Vice President, followed by two years of service as Alameda County’s President and two more years as its Governor. While Pat was President and Governor, ACLSA member Gloria Noren (an officer with LSI) took Pat under her wing and introduced her to various people at the state meetings. When she became First President for personal reasons she resigned.

Pat’s first appointment for LSI was under Patricia Greene’s term. She was a member of the Study of Structure Committee which was chaired by Phyllis Hirsh, a member of Beverly Hills/Century City LPA, and an officer with LSI for many years. Phyllis was a wonderful influence and encouraged Pat to become more active in LSI. Pat attended the first Newcomers’ Lunch at the annual conference and sat with Don Lee, then president of Merced County. At that conference it was voted to make the luncheon permanent.

Pat’s next appointment for LSI was under Suzanne Allen (LSI Past President 1978-1980) and was the first Assistant Editor of the Legal Secretary’s Handbook and had the privilege to work with then Editor, Marion



Freeman. Pat was also a member of the CEC. While serving as Executive Advisor for Caroline Van de Pol, Pat also served two years as the Liaison to the Law Office Management Section.

During the term of Joan Moore, the treasurer served for one year and left the law field. Pat was encouraged to run for office, which she did, and was installed as Treasurer in 1981 in Sacramento. In attendance at Pat’s installation was Mildred Drost, LSI Past President 1942-1944, and a member of Alameda County LSA. In addition, the first CCLS test given during Pat’s term and she appointed the first male member to a chairmanship. Wondering how long we’ve been working with the Rutter Group? It was during Pat’s presidency that the contract with the Rutter Group was negotiated and signed.

Pat’s mentors include Joan Moore, Suzanne Allen and Phyllis Hirsh. Many of you know that she was mentor to Christa Davis. She saw the potential in Christa to be a state officer and ultimately president. Pat encouraged her to be active and helped her along the way. “It was a wonderful experience to see the growth of someone you knew for so many years, and also knew she had the potential she didn’t see in herself,” said Pat.

After leaving a law office, she was the Executive Director for the Association of Certified Family Law Special-

Continued on page 33

KAY J. THORNBURG,

LSI Past President 2002-2004

Kay, as most of you know, is San Diego LSA's darling, serving numerous positions on its board and daring to take it further by serving as LSI's President during 2002-2004, after serving in each elected office. She remains a well-respected and active member at both the local and state levels and one to whom officers, chairs and members still turn to for guidance.

Kay was born in Walla Walla, Washington and later attended Hermiston High School and Oregon State College (it later became Oregon State University) for one year. She also attended business college and finished a one-year program in just six months. One of her most treasured memories was at the business college (which no longer exists) where she taught physically challenged and/or disabled students to type—on manual typewriters. Some held a stylus in their mouth, others used their feet. It was truly amazing what these men and women accomplished. In addition, she mentored a young woman who had severe epilepsy, but who managed to complete the course with honors. Truly a rewarding and unforgettable experience for Kay.

Her very first job was in high school working as the receptionist/secretary for Pendleton Grain Growers for two years. She also worked as the secretary to the Special Agent for Union Pacific Railroad (where her boss, Lou Holihan, taught her to read fingerprints) and she also worked as a part-time bank teller before going to college.

While in college, Kay worked for a company that manufactured plywood products and after college she was a service representative for United States Steel. I asked her why and when did she decide to become a legal staff member. She mentioned that an attorney she met in the building cafeteria where she was working offered her a job making much more money than she was making at

US Steel. When Kay told him that she didn't have any legal experience, he said: "Can you spell? Can you type?" to which she replied, "Of course"! He hired her on the spot. She worked at Morrison, Bailey, Dunn, Cohen & Miller in Portland for two years. Since US Steel was relocating to Seattle, Washington, and she had already made up her mind that she was not moving to Seattle, it was a win-win for her.

One summer, Kay worked for the Law Office of Bud Bliss for two weeks while his regular secretary went on vacation. He gave her a 2-page metes and bounds description (no errors!!) to type while he was also on vacation. Kay managed to get it done with no errors shortly before her part-time employment with Bud was over.

She learned everything one needs to know about construction when she was later employed at Fought & Company as the CFO's (and anyone else who needed assistance) secretary. The company fabricated I-beams, H-beams and other heavy construction materials.

Next came a job at Raleigh West Executive Suites, a commercial 5-story building where she worked for the building manager and the building owner. The building manager and Kay established the Raleigh West Executive Suites, which were a new concept at that time. There were several tenants in the building who occupied the Executive Suites and she did their secretarial work. It was a challenge to keep up with all of the tenants' work, on a timely basis, but her time was

correctly billed – and timely paid. Tenants included a reporter from The National Enquirer, a future Oregon senator, and a host of other people, none of whom were around very much, and none who were particularly memorable.

Marriage to Paul Thornburg, a United States Marshal, took Kay to Dallas, Texas. They lived in Arlington, which involved a 45-minute drive each way to work. Kay and Paul have one son, Mike, and two daughters, Caryn and Julie (both of whom served in Desert Storm and who are retired from the Army).

She worked for one attorney in Dallas, a rather distasteful man, at Strasburger, Price, Martin, Kelton & Unis. They always knew if he prevailed in court because the smell of his cigar announced his triumphant return. It was a large firm, on the 20-something floor of a Dallas downtown building. The firm employed a "steward" who took care of the lunchrooms. When the steward retired he was presented with a gold watch and a brand new Ford – the biggest made at that time. There were two lunch rooms: one for the attorneys and one for the rest of the staff. A dilemma arose for the firm when they hired the first female attorney. Did she use the attorneys' lunchroom or the staffs' lunchroom? After some contentious negotiations she finally was welcomed into the attorneys' lunchroom.



Continued on page 9

Paul's transfer to San Diego occurred in 1973, and in 1974 Kay started work for Gray Cary Ames & Frye. For most of her tenure with Gray Cary, she had only one "boss," Terry O'Malley, who is now the co-CEO of DLA Piper. Terry, says Kay, is "one of the most charismatic attorneys I have ever met, and I was very proud of the 30+ years I sat outside his office." He was a great mentor, patient, and never yelled (at Kay anyway). Thanks to him, she met some very important and high ranking individuals. While working at Gray Cary, Kay also had the pleasure of working with Gregg Zive, now the Chief Bankruptcy Judge for the State of Nevada, Bill McCurine, now a Magistrate Judge for the Southern District of California, Marilyn Huff, at one time the Presiding Judge for the Southern District of California, and Jay



Rains, a high ranking official for the US Golf Association. Jay Rains is also the United States Co-Chair for DLA Piper and several years ago brought the US Open to San Diego. Kay says that: "all in all, my life as a legal secretary was a great experience and one I wouldn't trade for anything."

Kay's advice to current legal staff is "education, education and more education. Dress professionally and act professionally. Be on time. Join your local association and LSI—even if your

employer doesn't pay your dues. It is well worth the investment." Her mentors have included Rhoda Spencer, PLS, CCLS (San Diego), Liz Walsh (San Diego) and everyone's favorite Texan, Diana Estabrook, PLS (Santa Rosa).

Since Kay's presidency and compared to today, LSI had many more associations than it does now and things were not so structured. At conferences, the attendees actually had time to spend visiting with friends and having great fun and getting acquainted with others from around the state. There was one 2-hour seminar on Saturday morning which qualified for CCLS credit. This format has now been reinstated by the CEC at the Quarterly Conferences. Kudos to all those who made this happen!

In comparing today's work environment with Kay's experiences, today's workplace is much more complicated and structured and technology now plays such a huge part in the legal work environment. Just about the time you get comfortable with one computer program, a new version is on the market and learning that new program begins. In the early 70's legal secretaries not only typed and answered phones, they also performed many of the duties now handled by paralegals or legal assistants.

Kay has received numerous awards, including being a member of her Junior High School's National Honor Society, which she did even know existed until her name was called at graduation. That's okay though ... after all, it was the 60s and 70s and I know those years were a bit hazy. She was also on her high school's National Honor Society, received outstanding science student awards during her sophomore, junior and senior years, was President of Girls League, Girls Athletic Association, Concert band (clarinet, bass clarinet, bassoon, three different saxophones), marching band (clarinet and bass drum), Music Honorary, Future Nurses Association, received San Diego LSA's Service Award, Secretary Cum Laude in 1986, and received the LSI President's

Award (1984-1985) from then LSI President, Linda Duarte. Her volunteer activities include the Friends of the Santee Library, a 501(c)3 corporation and she is currently serving her second term as its Secretary. She also served on the Board of Directors and during her first year in that position, served as Chairman of the Bylaws Committee tasked with amending and restating the Bylaws because they had never been revised since the Bookstore's inception (a long time ago). The Library also ships books to our deployed military members. Over the past four years, the Bookstore has shipped over 500 boxes of books to our troops. In 2012, the Bookstore donated over \$55,000 to the Santee Library for the purchase of books, remodeling the Teen Center within the Library, computers and new furniture for that remodel, among many other items necessary for their community outreach programs and young children's activities. Kay is glad she is retired. If you can't find her, it's because she is cruising some exotic location in the world, reading her books and doing what she wants. She has taken cruises to Ensenada (probably a dozen or more), the Mexican Riviera (twice), Alaska, the Panama Canal, and the Caribbean. A 2-week cruise in and around Hawaii is in the planning stages with an old friend from the Gray Cary days. Need any advice when venturing on a cruise? Kay is your girl.

The next time you see Kay at one of the LSI conferences, take the time to introduce yourself to this remarkable lady who continues to contribute so much to both her local association and LSI. She is very popular with conference attendees as evidenced by the huge applause she receives at each conference. When I asked her if she was a mentor to anyone, she replied that it was classified information ... in any event, she remains someone that I consistently look up to.

LS

This article was possible with the assistance of Linda Gubba-Reiner, CCLS.

PRESIDENT'S MESSAGE

Continued from page 3

in the Summary of Due Dates and Deadlines for each LSI Quarterly Conference and Annual Conference. Written reports that are not timely submitted to the LSI Administrator by the deadline listed in the Summary of Due Dates and Deadlines must be printed and submitted in paper format. The Officer, Appointed Officer or Chairman submitting an untimely written report may not be eligible for reimbursement of copies under LSI Standing Rule 17.5.3.

17.5.3.1 - Notwithstanding any other provision in these Rules, any LSI Officer, Appointed Officer or Chairman who submits an untimely report to the LSI Administrator, and is therefore required to submit a report in paper format, may not qualify for reimbursement under Standing Rule 17.5.3.

The LSI Standing Rules have already been updated by our LSI Parliamentarian, Astrid Watterson, CCLS, and are posted on the LSI website.

Lastly, but more importantly, there are members of the legal community who volunteer their time and participate at LSI conferences. We sincerely appreciate and acknowledge those who were able to join us at the LSI November 2013 Conference:

- Saturday morning Welcome Speaker, Susan Steward, Esq., Partner in the Cerritos Office of Atkinson, Anderson, Loya & Romo;
- Saturday Banquet Master of Ceremonies (MC) Cristina M. Hernandez, Legal Document Assistant and CEO/Owner of Attorney Assisted California Centers;
- Sunday Brunch Inspirational Speaker, Gerrie Schipske, Esq., a Registered Nurse Practitioner and an Attorney at Law. Ms. Schipske is currently Vice President of the Medical Board and the first and only Registered Nurse to serve on a state medical board in the US. Ms. Schipske has written three books on the history of Long Beach and shared a brief synopsis.

It is because of their participation, that all our LSI conferences are educational, fun and successful – our sincere thanks to them!

COMING UP – FEBRUARY 2014 QUARTERLY CONFERENCE

There are many benefits and reasons to attend LSI Conferences: they are educational, fun, a great opportunity to meet and network with colleagues and friends, great entertainment is always provided, a hospitality suite is always provided by Don Lee (Mr. Hospitality), great food – the list goes on and on! Everyone is excited again about LSI and about all that is happening within LSI. If you are not attending conferences, you are missing all the action.

LSI's next conference is coming up in Modesto – **Weekend in Europe!** The members of Stanislaus County LPA and Merced County LPA are ready to share an upcoming eventful weekend. LSI is returning to the Double Tree Hotel in Modesto – a wonderful conference location. As a heads up, they plan to have a “shoe decoration contest,” the winner to be announced at Brunch. Also, plan to visit Amsterdam, London, and Italy during the weekend. Detailed information regarding our February 2014 Quarterly Conference is included in this issue. Read the article and you will definitely be persuaded to attend the upcoming educational February 2014 Quarterly Conference – register early, don't miss it!

Visit the LSI website, www.lsi.org, and check out the posted information regarding topics and speakers for the February Legal Specialization Sections (LSS) Seminars, the Continuing Education Council's (CEC) educational seminar, and the CCLS workshop. More information is included in this issue of The Legal Secretary magazine. Remember that LSI is an MCLE provider and all seminars may provide continuing legal education credit.

We look forward to seeing you in Modesto! **LS**



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attended Brigham Young University where he received a Bachelor's Degree in Accounting and Information Systems. After graduation, he worked in public accounting before shifting his focus to law. Joshua earned a Juris Doctor Degree from California Western School of Law where he gained valuable experience in mock trial competitions as an active member of the Moot Court Honors Board.

Joshua's early legal experience included clerking for a San Diego based law firm that recovered \$7.2 billion for defrauded investors in the case of *In re Enron Corporation Securities Litigation*. He also worked for an insurance defense firm before discovering his true passion; representing injured persons and their families against major insurance companies.

Joshua specializes in personal injury law and litigation; representing injured clients in a variety of personal injury actions throughout northern California. Joshua prides himself on maintaining an open line of communication with every client and strongly believes that injured persons should have access to the same experienced, quality legal professionals as insurance companies.

In addition to spending quality time with his family, Joshua enjoys the outdoors, snowboarding, basketball, and traveling. Joshua is admitted to practice before the State Bar of California and the United States District Court - Eastern District of California

A TRIBUTE TO THE LEGAL SECRETARY

BY JOSHUA C. BOYCE, ESQ.

SUBMITTED BY PLACER COUNTY LPA

The time on your computer monitor says 3:07 p.m. Beads of sweat slowly begin to appear on your forehead prompting an impulsive glance at the thermostat. It's the last day to file and serve a motion to compel and you've just been informed that opposing counsel will not agree to the terms outlined in your most recent meet and confer letter. Suddenly, your imagination runs wild; accusations of malpractice, disciplinary action and, yes - even disbarment flutter through your heightened sense of consciousness.

Your fingers instinctively find the keyboard on your desk. Eyes closed, you struggle to recall the names of cases in which you have filed similar motions in the past. Your thoughts become muddled. Paralyzed by the mounting pressure to perform under unforgiving time constraints, you exhale slowly and tell yourself aloud to "pull it together." After what seems like an eternity, you remember the names of several potential candidates. Your fingers poke frantically at the keys until the motion is there in front of you on the screen. Almost forgetting to breathe, you scan the document with anticipation; your excitement builds as you discover the issues, with small exceptions, are very similar.

Looking back at the clock, time seems to be flying now; mocking you with every passing minute. In addition to drafting the motion, you have exhibits to copy, checks to draft for filing fees, proofs of service to draft.

How can you possibly get everything put together and out the door in time? The answer, of course, is sitting in the adjacent office - your legal secretary. This person has saved you on more than one occasion and - let's be honest - this won't be the last. After all, as any lawyer or legal professional knows, no legal practice can be run efficiently or effectively without a legal secretary.

It is no secret that a legal secretary is required to balance several different roles while maintaining the "last line of defense." Job duties may include, but are not limited to, calendaring, preparing discovery to be reviewed by an attorney, managing an attorney's calendar, interfacing with clients, opposing counsel and the court, drafting pleadings, coordinating depositions and communicating with vendors, among many others. But it is the often overlooked and intangible qualities that truly define the value of a legal secretary.

Adept legal support staff can dictate, to a large extent, the working environment in any given office. Promoting an atmosphere of respect and tolerance in the workplace does not happen by accident. It is promulgated through a focused, purposeful effort by each member of the office. In almost every setting, however, it begins and ends with the legal secretary. Speaking personally, my job and my life are made easier by the hard work, diligence and kindness of this person in my office.

So, as we all strive to "fight the good fight" and serve our clients to the absolute best of our ability, I would admonish all of us not to take our legal support staff for granted. I would remind us to not only see them and acknowledge them for the things they do, but also recognize who they are and the working environment they skillfully cultivate for our mutual benefit.

LS



SHAYNE CORRIEA-FERNANDEZ

is a Senior Case Manager with JAMS and is based in the Sacramento Resolution Center. She began her career 14 years ago as a Client Coordinator and now handles case management for several neutrals and also has duties that extend beyond Sacramento through her involvement in the Arbitration Demand Team for the entire Northwest Region of JAMS. Shayne has a vast amount of experience with all types of ADR, including setting up and managing the arbitration process, setting up mediations, as well as with assisting neutrals to manage special master assignments. Shayne has presented ADR certification modules and CLE programs to legal assistants, paralegals and legal secretaries.

"Ins and Outs of Arbitration"

WRITTEN BY: SHAYNE CORRIEA-FERNANDEZ, JAMS SENIOR CASE MANAGER

SUBMITTED BY SACRAMENTO LSA

JAMS, the largest provider of ADR services nationwide, has seen an increase in the number of arbitrations we receive. In particular, there has been an increase in the areas of complex, multiparty business disputes where JAMS is written into the contracts. As a Senior Case Manager with JAMS the past 14 years, I administer a wide range of general arbitrations from business and employment disputes to personal injury and family law. This article is a helpful tool written to provide legal secretaries and paralegals a better understanding of the arbitration process and what is needed by JAMS when submitting a matter. At the end, I've also included a few helpful tips from two of our local neutrals that handle the majority of arbitrations in our Sacramento Resolution Center, Justice Fred Morrison and Judge Cecily Bond.

Arbitration is a process by which a third party neutral is hired to hear and consider the facts and/or arguments by counsel (plaintiff and defense) and to render a final and binding decision. I like to refer to Arbitration as a mini court trial. Most often it is binding and unlike a court trial where there are appeal rights, there is limited court review. This process is the direct opposite of mediation, yet sometimes legal professionals get the two confused.

Mediation is an informal, voluntary process where the parties to the dispute directly negotiate the settlement with the Mediator's help and expertise. There are no formal rules and no binding decision will be given by the Mediator.

Arbitrations are usually driven by a pre-dispute clause found in the parties' contract. The arbitration clause is what directs the Case Managers at JAMS on how to administer the matter by including important information such as: which rules will govern, whether the arbitration is binding or non-binding, if the arbitrator shall be

a retired Judge or attorney, in what location the hearing will be held, and how the fees will be split. One of the great benefits of arbitration is that the parties can stipulate to modify the terms of the arbitration clause to tailor the process to best suit their needs. Parties may stipulate to a less formal process with things such as discovery so that the matter can be completed from start to finish in just a few months. Often times in court you could be involved in a case that lasts years before getting in front of a Judge.

Some parties even agree to a hybrid process called a "Med-Arb." This process combines the benefits of mediation and arbitration. Normally the parties start out mediating their dispute and if settlement is not reached, they will ask the Mediator to then become their Arbitrator and make a final binding decision. In most cases, the Mediator and Arbitrator are two different neutrals but in many matters the parties stipulate to use the same neutral. Some feel this process speeds things up so as to allow for a quicker resolution.

Whether you are looking to arbitrate or to use the hybrid process of a Med-Arb, there are a couple of things secretaries and paralegals can do when submitting their matter to JAMS that can cut down on some of the time needed to gear up for the actual hearing. When submitting the arbitration to JAMS, the best form to use is our Demand for Arbitration that you can find on our website at www.jamsadr.com. Using our form ensures that the Case Managers have all the accurate information needed to start a file such as: identifying all parties and attorneys, the rules that will be used to govern the matter, who is responsible for fees, and providing the contract with the arbitration clause and/or stipulation by all to utilize JAMS. It's also best to submit the case management fees along with the demand and the proper number of copies of the paperwork. Having a complete demand package ensures swift commencement of the arbitration. If the demand is incom-

Continued on page 13

plete, it can unnecessarily slow down the process and can cause frustration for everyone involved.

Once we commence the matter, the parties are given a strike list to help in the selection of their Arbitrator. Thereafter, the parties have a short timeframe by which to mutually agree on an Arbitrator or to return their strike list, usually in 7 days. We then notice the appointment of the Arbitrator, bill the retainer fees, and serve the parties with the mandatory disclosures. A common misconception made by attorneys and their offices is that the hearing will be set immediately following the notice of appointment, not realizing the CCP disclosure requirements exist. In California there is the 15 day disqualification period and the Arbitrator cannot work on the matter during the disqualification period. Educating yourself on the commencement process and disclosures requirements can be the most helpful thing you can do for your attorneys and clients and will eliminate unnecessary delays.

After the disqualification period ends, the pre-trial phase begins with discovery and a preliminary conference with the Arbitrator is held. During the conference the Arbitrator and the parties will create a road map, on how they want their particular matter to flow. Discovery disputes will be set and heard and the arbitration hearing itself will be calendared. Once the hearing is complete and the arbitration is fully submitted, the Arbitrator has 30 days to render a decision usually in the form of an Interim Award, if further briefing is needed, followed by the Final Award. Sounds easy enough, right? We hope so, as far as administratively!

As promised, in writing this article, I chatted with some of our neutrals, Justice Fred Morrison and Judge Cecily Bond, who provided a few additional tips for you that you may wish to pass along to your attorneys. First, having a court reporter present at a multiday hearing is especially helpful to the Arbitrator and allows the Arbitrator to concentrate on testimony rather

than being distracted by taking notes. Secondly, thoroughly organizing exhibits and creating a joint exhibit list and numbering system can cut back on a lot of time the Arbitrator needs to locate exhibits during the hearing. Lastly, giving accurate summaries in the closing briefs and legal citations is very helpful when the Arbitrator goes to write the award.

As I mentioned previously, arbitrations are on the rise and if you haven't already, I'm sure you will be tasked by your attorney at some point to schedule a matter with JAMS. Hopefully this brief overview about the arbitration process will be beneficial to you at that time. And if you are given such a task, I hope I have the opportunity to work with you. **LS**

Congratulations

To LSI's newest California Certified Legal Secretaries,
who took the exam in October 2013:

- Rachel Alm, CCLS (Orange County LSA)
- Gwendolyn Edwards, CCLS (Beverly Hills/Century City LSA)
- Laura Galvan, CCLS (Los Angeles LSA)
- Annabel M. Gray, CCLS (San Fernando Valley LSA)
- Melanie A. Herman, CCLS (Mt. Diablo LPA)
- Marjorie Hung-Lau, CCLS (San Gabriel Valley LSA)
- Gaynell Hunter, CCLS (San Diego LSA)
- Tressa Jacobsen, CCLS (Member At Large)
- Roxann R. Jaggi, CCLS (San Diego LSA)
- Shari Lynne Koroush, CCLS (Sacramento LSA)
- Lisa Morrison, CCLS (Member At Large)
- Maria A. Nunez-Simental, CCLS (San Diego LSA)
- Gail Quon, CCLS (San Fernando Valley LSA)
- Heather M. Rodriguez, CCLS (Sacramento LSA)
- Nelva Rodriguez, CCLS (San Fernando Valley LSA)
- Cynthia Saucedo, CCLS (Alameda County LSA)
- Kristina Shultz, CCLS (non-LSI Member)
- Pamela K. Stallings, CCLS (Santa Clara County LPA)
- Sallie Whitsett, CCLS (Placer County LPA)

Each of these individuals rose to the challenge of taking the CCLS exam, and through their hard work and dedication to attaining their goal, passed the exam, and became California Certified Legal Secretaries. If you see any of these ladies, please congratulate them on their achievement.



MARY J. BEAUDROW, CCLS,

is Vice President of Legal Secretaries, Incorporated. Mary is a member of Mt. Diablo LPA. She has worked in the legal field since 1977, and has worked for the law firm of Morrison & Foerster LLP since 2002, where she is currently a Senior Docket Coordinator. Mary is a former member and Past President of San Francisco LPA.

MARKETING LSI

BY MARY J. BEAUDROW, CCLS, LSI VICE PRESIDENT

Marketing Legal Secretaries, Incorporated is an important aspect of the duties of the Marketing Coordinator and the Marketing Committee. At times, we take for granted that everyone is aware of our organization – why we are here and what we do. However, there are many legal professionals who know nothing about Legal Secretaries, Incorporated. Because of this, we attempt to pursue as many avenues as are available to us and educate the legal community about Legal Secretaries, Incorporated (LSI).

One of our biggest marketing tools is the LSI exhibitor booth. Each year LSI is an exhibitor at the State Bar Annual Meeting. Members of the Executive Committee, the Marketing Committee, and sometimes LSI Past Presidents, staff the LSI booth. The booth is provided courtesy of The Rutter Group and because of our affiliation with The Rutter Group, we are guaranteed a highly visible location each year. For those of you who are unfamiliar with the State Bar Annual Meeting, it is much like our Annual Conference but on a larger scale. This year the conference was held in San Jose, and next year it will be in San Diego. Along with a general meeting, they provide many educational classes and social activities, and there is always a large room for the exhibitors. This year there were well over seventy exhibitors.

We are fortunate to have a great working relationship with the staff at The Rutter Group, especially Kalman Zemplyny II. Kalman is the Executive Director and General Manager at The Rutter Group and goes out of his way each year to make sure that we have everything we need to run a successful exhibit at State Bar. The Rutter Group pays for the cost of the LSI exhibitor's booth at the State Bar Annual

Meeting. This is a savings to LSI of approximately \$1,700 per year. We are very fortunate and appreciative to The Rutter Group for covering the cost of our booth each year.

Through the State Bar Annual Meeting, LSI is able to market the organization to a wide range of attorneys and legal professionals throughout the state. Many do not know about our organization, so we strive to educate as many attendees as possible through communication, distribution of information packets, and sales of the *LSI Legal Professional's Handbook*, *The Law Office Procedures Manual*, and *The Legal Secretary's Reference Guide*. The information packets distributed contain a copy of *The Legal Secretary*, a mini CCLS mock exam, brochures about the *LSI Legal Professional's Handbook*, *The Law Office Procedures Manual*, the California Certified Legal Secretary program, the Legal Specialization Sections, and note pads courtesy of BurdgeCooper printed with the Legal Secretaries, Incorporated name and logo.

Our marketing tool this year was a mini-notebook with a pen embossed with the LSI logo and contact information. They were a huge hit with the attendees. The mini-notebook and the note pads are great marketing tools

because long after the State Bar Annual Meeting is over, the mini-notebook and note pads with our contact information printed on them will be visible and used.

As stated above, members of the Executive Committee, the Marketing Committee, and LSI Past Presidents staff the LSI Booth. We chat with attendees who approach our booth and familiarize them with the organization and the publications. We encourage the attendees to take an information packet back to their support staff and urge them to contact an association closest to them. Many attorneys are more than happy to relay the information because they see the value and benefits they will receive.

In addition to working the LSI booth, and because we are vendors, we are afforded the opportunity to attend any of the seminars offered at the State Bar Annual Meeting at no charge. Working the LSI booth provides an ideal opportunity for the members of LSI to acquaint conference attendees with our organization. It is an honor and a pleasure to represent Legal Secretaries, Incorporated at the State Bar Annual Meeting. **LS**



Odds and Ends from the Corporate Office

BY CATHERINE CULVER, LSI ADMINISTRATOR

Hello again from Friendly Fortuna, home of LSI's corporate office. I hope that you enjoyed the holidays and that 2014 is unfolding with the promise and excitement that new years often bring.

A few things have been on my mind to share with you. First, a reminder that if you are not receiving your magazine, to please tell your association's treasurer. (Members at large: please email me at lsiorg@suddenlinkmail.com) Sometimes your association's treasurer may have an address that is no longer valid for you. Perhaps you changed jobs, or moved your residence, or want to receive your magazine at your home rather than your office, or vice versa.

Your treasurer will let corporate office know to what address your magazine should go, and he/she will change the association's membership records, so that when the new LSI year begins in May, the address reported for you will be current. While I will always change your address if you email me, the change is lost if you don't report that change to your association's treasurer since the addresses input for the magazine list come from those provided by association treasurers at the time per capita tax is submitted. If you miss a magazine, please ask that one be mailed to you. Corporate office does receive a few copies to be distributed for this purpose, and I am happy to mail a copy to you.

What a great conference we enjoyed in November at the Hotel Maya in Long Beach. Thank you Long Beach LPA for what felt to me like a tropical vacation weather-wise. I was able to finish my CCLS required education credits in a lovely location with interesting topics. Attending conference is both educational and fun. A member begins to understand the strength and usefulness of LSI membership when attending conference. If you would like to share a room, but don't have a member from your association able to join you, contact the registration chair of the conference. That is the person to whom you send your registration form. The registration chair is in a position to know who else may be looking to share a room and can suggest possible roommates. Don't let the lack of a roommate deter you from coming until after you have worked with the registration chair. And don't forget: your spouse, children, significant others, and friends are welcome. Attending a conference will open their eyes to what you do, and what you are a part of, when they are exposed to conference.

A note to local association treasurers: during the final quarter you will be receiving a print out of the names

and addresses of your members as they are known to LSI along with your initial per capita tax form. Please use this list to make changes on - adding sheets for new members, and making changes to the print out as needed. Alphabetize your members by last name. Alphabetizing by first name means I spend more time processing your association's membership.

If you list both home and work addresses, please be sure to indicate to which address your member's magazine should go.

Passing on your books to a new treasurer? If so, please share this information with him/her.

Please encourage your successor to attend the treasurer's officer/chairman workshop at May conference. It is a great place to have questions answered, as well as share what works and does not work in performing the job of local association treasurer. Your attendance at the workshop will contribute to the available knowledge base, and is greatly appreciated.

Enjoy the conference in Modesto!

LS

California Certified Legal Secretary
A Program of
Legal Secretaries, Incorporated



APPLICATION

Please complete and mail this form to the following address with your check to reserve your place at one of the examination venues:

**CCLS Certifying Board
14403 Leibacher Avenue
Norwalk, CA 90650**

(Select One)	(Select One)
<input type="checkbox"/> Northern California <input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 19, 2013 <input type="checkbox"/> Saturday, March 15, 2014

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
LSI MEMBERS** Registration fee: \$ 25.00 Examination fee: <u>\$ 100.00</u> Total \$125.00	Non-LSI MEMBERS Registration fee: \$ 75.00 Examination fee: <u>\$ 100.00</u> Total \$175.00		
<div>Enclosed is a check in the sum of \$ _____, payable to LSI.</div> <div>* Fees subject to change without notice.</div> <div>** LSI members: Name of local association: _____ LSA/LPA. Please enclose a photocopy of your local membership card. You must be a member upon application to be eligible for reduced fees.</div> <div>*** Include \$30 late fee if applicable.</div>			

Name: _____ Last 4 Digits of SSN: _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____ Email: _____

Employment Record: Please list legal secretarial employment, beginning with your most recent (or current) employment, to show a minimum of two full years of such employment. Attach a supplemental page if additional entries are necessary to show two full years of employment as a legal secretary.

Dates: _____ Position: _____

Employer: _____

Address: _____

Supervisor: _____ Phone: _____

Summary of Duties: _____

I certify that I have completed this application truthfully. I understand that a false statement may result in the rejection of this application or revocation of my certification. I understand and agree that the contents of the examination are confidential and are not to be discussed. I understand that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Signature of Applicant: _____ Date: _____

Rev. July 2013

Quarterly Assignments

THE FOLLOWING ASSOCIATIONS ARE EXPECTED TO SECURE ARTICLES FROM GUEST WRITERS FOR PUBLICATION IN THE MAGAZINE ISSUES SPECIFIED BELOW.

- a. AUGUST ISSUE (to be submitted no later than **June 1st**):
Alameda County, Beverly Hills/Century City, Butte County, Capitol City, Conejo Valley, Desert Palm, El Dorado County, Fresno County, Humboldt County, Imperial County
- b. NOVEMBER ISSUE (to be submitted no later than **September 1st**):
Livermore-Amador Valley, Long Beach, Los Angeles, Marin County, Merced County, Mt. Diablo, Napa County, Orange County
- c. FEBRUARY ISSUE (to be submitted no later than **December 1st**):
Placer County, Redding, Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County
- d. MAY ISSUE (to be submitted no later than **March 1st**):
Santa Barbara, Santa Clara County, Santa Cruz County, Santa Maria, Sonoma County, Southern Butte County, Stanislaus County, Stockton-San Joaquin County, Trinity County, Ventura County

Dates to Remember in 2014

February 12, 2014	Lincoln's Birthday – Courts Closed	March 31, 2014	César Chávez Day – State Courts Closed
February 13, 2014	Last Day to Register for CCLS Examination (late registration)	April 26, 2014	Deadline to respond to LSI Directives
February 17, 2014	Presidents' Day – Courts Closed	April 30, 2014	Deadline for submission of Chapter Achievement Contest entry forms
February 21-23, 2014	LSI 3rd Quarterly Conference Doubletree Hotel Modesto, Modesto, CA Host Association: Stanislaus County LPA and Merced County LPA	May 15-18, 2014	LSI 80th Annual Conference Concord Hilton Host Association: Mt. Diablo LPA
March 1, 2014	Deadline for submission of articles to The Legal Secretary		
March 15, 2014	CCLS Exam		

Helpful Websites

Supreme Court of the United States
<http://www.supremecourt.us>

Office of the Attorney General
www.ag.ca.gov

California Courts
<http://www.courtinfo.ca.gov>

California Assn. of Legal Support Professionals
www.calspro.org

California Codes
<http://www.leginfo.ca.gov/calaw.html>

California State Bar
http://www.calbar.ca.gov/state/calbar/calbar_home.jsp

California Legislative Information
<http://www.leginfo.ca.gov>

U.S. Citizen and Immigration Services
<http://www.uscis.gov>

Administrative Office of the U.S. Courts
<http://pacer.psc.uscourts.gov>

American Medical Association
<http://www.ama-assn.org>

American Association of Law Libraries
<http://www.aallnet.org>

National Notary Association
<http://www.nationalnotary.org/index.cfm>

California Secretary of State
www.sos.ca.gov

National Court Reporters Association
<http://www.ncraonline.org>



CYNTHIA J. MASCIO, ACP, CAS, CEDS,

is a paralegal at Atkinson, Andelson, Loya, Ruud & Romo in Cerritos, California. She has attended and assisted in over 25 civil trials, most recently in September and October 2013, and has acted as case manager in cases involving hundreds of parties and thousands of pages of documents. Ms. Mascio currently serves on the Executive Committee of the Law Practice Management and Technology Section of the State Bar of California as a Special Advisor and Treasurer. She is also a Director At Large on the Board of Directors of the Orange County Paralegal Association. She has received several recognition awards, including OCPA's Lifetime Achievement Award in December 2010. In July 2011, Ms. Mascio became a member of the select maiden group of e-discovery professionals to pass the rigorous Certified E-Discovery certification examination.

Planning an Out-of-Town Trial

BY CYNTHIA MASCIO, ACP/CAS/CEDS
SUBMITTED BY SAN FRANCISCO LPA

Two of the most essential skills for litigation paralegals to possess are the abilities to gather critical information and to prepare it for effective use at trial. Planning for a trial that will take place in a distant location can seem like a daunting task, especially when you are in the middle of trial preparation. But take heart – the location of the trial will have little impact on your trial preparation activities as long as you plan well in advance. No matter where the trial takes place, you will still have to deal with witness files, exhibits and exhibit lists, pre-trial filings and motions, witness preparation including subpoenas and scheduling, and other trial-related matters. And you will need to implement most of these tasks even at local trials.

FIND OUT AS MUCH AS YOU CAN ABOUT THE CITY WHERE THE TRIAL WILL TAKE PLACE.

Almost every city has a website that includes guides for visitors that will provide information regarding shopping, restaurants, points of interest, etc. Get maps of the area, especially around the courthouse. If it will be a jury trial, it might be helpful to look at a map to help assess where the jury pool will be from. In addition, you may want to subscribe to the local newspaper for a period of time so you can learn more about the issues of concern and opinions of citizens in the area.

Try to visit the area well before the trial. This may not be possible, but if you can, it will help you immeasurably. In addition to locating services that you will need for trial, which will be discussed below, find out the locations of a pool, gym, and/or workout rooms. The hotel will likely have this information as well as information about other places of interest for the team.

THE LOGISTICAL ARRANGEMENTS OF AN OFF-SITE TRIAL WILL BE DIFFERENT. The very first thing you should do is get organized - create lists of everything

you can think of that will need to be done. For example, a trial logistics memorandum, trial site office needs list, logistics "to do" list, shopping list for the trial site, memorandum to trial team regarding trial site set up and first days, index of materials to deliver to trial site, and trial site breakdown checklist. If this is your first trial, or your first trial with the firm, talk to your supervisor about getting together with paralegals in your office who have recently gone to trial. Then meet with them and get as much information as you can about what to expect, what you need to do, how the firm does things, etc.

It is always a good idea to have a team meeting with everyone on the trial team, including the attorneys, to review everything that will need to be done and the deadlines that need to be met. Someone on the team, more than likely you, needs to oversee the costs and alert the attorneys wherever appropriate. Trials can be very expensive, and efforts should be made to save the client money whenever possible.



Continued on page 19

More than likely the firm you work for did not hire you to do manual labor or as a truck driver, so please do not plan to move boxes and equipment by yourself! Depending on the size of your firm and the budget for the trial, it may be appropriate to hire temporary helpers or hire movers, or ship everything via UPS, etc. Consult with the trial attorney(s) and/or the general services in your firm to help you decide on the best approach for transporting the materials for your particular trial.

THE HOTEL. Make hotel reservations well in advance of the first day of trial. You can always cancel them if you find you will not need them, but you do not want to find out at the last minute that you are unable reserve rooms in the right location. The ideal hotel is one that is located within walking distance of the courthouse. In addition to the hotel rooms you will need for the trial team, you will likely need space for a workroom area, a room or two for out-of-town witnesses, and possibly a conference room. Make arrangements for mail delivery and delivery of packages or boxes to team members and/or to the workroom(s).

THE WORKROOM SITE. Often, the workroom(s) will be located in the hotel where the team is staying. This may be the easiest location for the team, but there are special issues to consider regarding using hotel rooms as workrooms:

- Check on the availability of office furniture, extra lighting, and portable shelving. You will need permission from the hotel to move their regular furniture out of the workroom(s). You will also need permission to move in items like shelving units, bookcases, and other office equipment or furniture.
- Check on the number of outlets in the room(s) — if there are not enough, work with the hotel to figure out the best way to accommodate the requirements. Also, it is likely the workroom(s) will be an extra power drain because of the computers and other equipment, so address this early with the hotel.
- You will need to work with the hotel to schedule a time to move the boxes and equipment into the workroom(s). They will not want you to interrupt their regular business flow. Ask specifically about elevators, including freight elevators, property passes, and other building access issues.

The person(s) who will be providing Technical Services for you (and often the telecommunications company as well) will need to work with the property manager or someone at the facility well before the first day of trial. They will have questions about cabling, they will need access to the building, they will need to make arrangements to move in the equipment, etc. Make arrangements for access to the facility well in advance to avoid arriving early to set up only to find that the property manager is unavailable and you are unable to access the facility.

Plan to move into the workroom(s) a few days before the first day of trial. You may need to arrange for special furniture to be delivered, you will need to arrange the boxes and trial materials, and you will need to set up the equipment. Be sure that any pre-programmed telephone numbers in a fax machine or in computers you have shipped to the site are correct. They may need to have area codes added, etc.

In the alternative, you may wish to consider renting or leasing space in a non-hotel building for use as a trial site. These trial sites may be part of a business park complex, a vacant space in an office or other building, etc. You will need to consider:

- How much space (square footage) will you need and how should it be configured
- Will there be furniture in the facility or will you need to rent/lease furniture?
- What is the best arrangement for the time you will be in the off-site trial? Month-to-month rental? Lease? Sub-lease office space from another business?
- What facilities and services will be available within the space? A receptionist? A kitchen? Copy machines and other office equipment?
- What about telephones and voicemail — will you need to have separate lines installed? Are they already available?

You will also want to find out about building security, building passes, and parking capacity and requirements. Make sure you understand how much this will cost the client.

If you work for a national law firm, it may be feasible to work out of a satellite office that is not your home office. If this is the case, you should notify the Office Director or Office Administrator as soon as you can about your trial, including dates (estimated date of arrival, first day of trial, estimated length of trial), number of team members, number of boxes, etc. You will need to reserve conference rooms, offices, and workrooms well in advance of the trial date. It may be that not all of the offices have the same staffing levels, services, or equipment. Be sensitive to the office you're taking temporary residence in and do not be unreasonable in your expectations. Ask if you need to make special arrangements for late-night typing help, try not to monopolize all the printers or copy machines, and watch your attitude if the office doesn't have everything you're used to. You're a guest!

Ask about phone numbers and temporary voicemail boxes for team members, if such would be appropriate. Make sure you know the rules about office hours; you may need to make special arrangements with the building to work very early or very late in the day. Make arrangements for keys, security passes, passwords, and parking facilities.

Continued on page 20

TRANSPORTATION. You will need to figure out exactly how everyone and everything will (a) get to and from the courthouse, and (b) travel around the city when not in court. It will all depend on the location of the hotel vis-a-vis the workroom site vis-a-vis the courthouse. If the plan is to use cars, get information about the parking situation. Where is the nearest parking lot, how much will it cost on a daily basis, will you need a special parking pass or permit, etc.?

If you will be using public transportation, get copies of schedules and maps of the routes. You will also want to be sure everyone remembers to take enough cash. If appropriate, you may want to purchase a monthly pass where available.

TECHNICAL SERVICES INVOLVEMENT. You will be relying heavily on the technology department of your firm or the outside vendor you may have retained to take care of your technology needs during discovery. You may need a Tech Services liaison to stay on-site, either temporarily or through the course of the trial, to assist you with any litigation support technology you are using such as Concordance, Sanction, and Trial Director. The Tech Services liaison may be able to provide support via internet or PDAs. Make sure everyone is clear about how this will work, for example, whether or not he/she will be available 24/7, who will be his/her backup when he/she is not available, etc. Be sure to get all contact information including e-mail address(es) and cell and home phone numbers.

Generally, Tech Services will set up the equipment in the workroom as well as the courtroom before the trial starts, and will dismantle it when the trial is concluded. They will need a floor plan well in advance of the move to the trial site. They also generally travel to the trial site in advance of the rest of the team to get the equipment set up. It is extremely helpful for someone on the team to go with them to oversee the proper placement of the equipment. You will need to make the appropriate arrangements with the clerk of the court as well as the facility where the trial team will work after hours regarding setup and access to cables and telecommunications. It may also be necessary to make special arrangements for delivery of the equipment through a dock or freight elevator.

Tech Services will need to complete many tasks before the off-site computers can be packed for shipment. Give them enough time to do their jobs! For example they will need to:

- Install all necessary applications on multiple computers
- Install PC Anywhere on critical computers
- Have all users log on to their computers after the changes have been made but before the machines are shipped; and
- Inventory all equipment that is going to the trial site

Technology has advanced enough that it is generally safe to assume you can rely on the internet or on a remote con-

nection to your firm's network to get to your documents, your databases, and your email 99% of the time. However, because there's always an outside chance of having an internet or network connection problem, copy all the case documents and databases from the network to the hard drive on your laptop or to an external thumb drive. If you copy everything to more than one machine (more than likely), be sure to agree which machine has the "master" version. Make sure everyone understands what they need to do to copy documents to another machine, and try to emphasize how important it will be to synchronize documents and databases between the local and the network versions.

Courtroom Equipment. Courtroom technology installations can be court-provided, lawyer-provided, or a mix. Plan ahead for use of the equipment, including the space required. Each configuration of bench, witness stand, jury box, and counsel tables will present design challenges for placement of monitors, projection screens, wires and cables, and other equipment. At the same time, the equipment and wiring should not detract from the appearance of the courtroom.

You will want to work with the attorneys and consultants, if any, to decide on the technology setup. In some cases, there may be small individual screens in the jury box, in others the lawyers may want to use a digital projector and large screen or some equivalent technology. These setups do the same thing — display exhibits for the jurors and others in the courtroom — how the evidence is presented is up to the attorney.

Plan For Equipment Failure. Try to have backup equipment available. Allow adequate time for setup and testing, including making sure that all of the equipment works together. Have the person who will be "driving" the equipment at the time of the presentation practice in the courtroom in advance of the presentation.

Make sure you have cleared the use of this equipment with the courtroom clerk or bailiff, as well as the security guard in the courthouse lobby. You may need a court order to bring in certain equipment or materials, and you will need to get this permission (and appropriate order from the court) in advance of the trial date. Always check with the courtroom clerk.

Consider whether any witnesses will appear via video-conference or by videotaped deposition. If so, you will need to plan in advance for the type and extent of equipment (monitors, TVs, VCRs, DVD players, speakers, etc.) and setup required.

Wireless Technology. If you will be using wireless technology, make sure you have the appropriate wireless cards and software on your computers. You should also make sure there are enough sites in close proximity so that you will not

have a problem using the technology. Do not assume wireless technology will be allowed in the courtroom — check with the courtroom clerk or bailiff to be sure.

OTHER LOGISTICAL CONCERNS. Try to delegate the logistical arrangements wherever you can. You need to know that it is all being handled and how, but you do not need to be the person doing it all even though you may feel more like a concierge at times than a paralegal!

1. **Travel arrangements:** If your firm uses a particular travel agency, enlist that agency to make all airline reservations in advance wherever possible. Find out if there is a hotel shuttle or if someone will need to be available to transport travelers from the airport to the hotel or the reverse. At certain stages in the trial, this might turn into a fulltime assignment so plan ahead. Make sure someone is keeping track of travel arrangements and reimbursements for out-of-town witnesses.
2. **Money:** Get appropriate cash advances from the accounting department in your firm. A firm credit card may also be an option, and of course you can always use your own credit card or checkbook and be reimbursed by the firm. Keep track of everything you spend, especially if you took out a cash advance.
3. **Record Keeping:** After trial, you may be required to prepare a detailed account of case costs for the client and perhaps for the Court. Details like tracking time and expenses are easily neglected during trial, and will be difficult to piece together afterwards. Although events during trial will seem inordinately vivid at the time, later you will not remember as many details as you may think. Record the expenses as they are incurred to avoid having to reconstruct events when you are in post-trial recovery.
4. **Meals and food:** Get or make a list of local restaurants in close proximity to the hotel, the workroom facility if the workroom is not in the hotel, and the courthouse. The hotel will probably have helpful information regarding restaurants. Find out if there is a cafeteria in the courthouse. Keep menus posted in the workroom and by the telephone. Find out about hours of food service within the hotel. You may want to order a small refrigerator for the workroom to keep drinks and healthy snacks on hand. It is often most efficient and cost-effective for the trial teams to meet as a group for meals, at least for dinner and often for lunch as well. One person can take the orders while other team members continue with their work. Eating together for dinner is also an opportunity to catch up on the events of the day. It may be less expensive to have food provided to the team by a caterer, at least for evening meals, than for everyone to go to a restaurant every night.

5. **Mail:** You may want to arrange for someone in your home office to send out an overnight package every day containing whatever mail or other materials need to be delivered to the trial site by the next morning. This arrangement is often very important during the first days or weeks of trial.
6. **Library:** Find out where the local law library is, hours of operation, any usage charges, and whether or not you will be able to use a copy machine there. Be sure you have enough copies of the Federal Rules of Evidence, Federal Rules of Civil Procedure, state rules of civil procedure, local rules, etc. available for the attorneys.
7. **Local graphics/blow-ups facilities:** Get some names, addresses, phone numbers, and contacts identified as soon as you can. Even if all of your graphics and blow-ups are finished before you leave for the trial site, you may need a local vendor to work with because of unexpected events or testimony at trial.
8. **Messengers:** Find out if the messenger service that you typically use has an office in the city where your trial will take place. If it does not, you will need to locate local messenger services. Make up a list of names, addresses, phone numbers, and contacts as soon as you can to provide to the messenger service when needed. You will also want to obtain pricing information — sometimes using a messenger service can be extremely expensive, even when compared to the billing rate of a paralegal who may otherwise become the delivery person, which may be the most efficient, cost-effective method of delivery.

SURVIVAL TIPS. Trials can be overwhelming and rewarding at the same time. This is especially true when you are out of your comfort zone at an off-site trial. During the trial:

- Get as much rest as possible.
- Try to stay upbeat and remember that everyone on the trial team is under stress and very tired, so do not take anything too personally.
- Do not feel like every second of your day has to be billable.
- Do not forget to take time to exercise, even if it is just for a 10 minute walk.
- Bring your iPod, iPad or other MP3 player so that you can listen to some of your favorite music when things get too hectic; and
- Do not expect to have a life from about six weeks before trial until after the conclusion of the trial.

AND ABOVE ALL –
TAKE CARE OF YOURSELF.
Your trial team is counting on you!

LS



LEGAL SPECIALIZATION SECTION SEMINARS
LSI 3rd Quarterly Conference – February 21-23, 2014 – Doubletree Hotel Modesto
Hosting Associations: Merced County LPA and Stanislaus County LPA
REGISTRATION FORM - DEADLINE IS Tuesday, February 11, 2014



Registration **MUST** be **RECEIVED** by the LSS Coordinator **on or before the deadline.**

Please make advance reservations so materials may be prepared. Please check all appropriate boxes below.

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
Friday, February 21, 2014 – 7:30 p.m. to 9:00 p.m.		
<u>LAW OFFICE ADMINISTRATION:</u> Topic: <i>Health & Safety and Risk Management</i> Speaker: Charles Craig <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>CRIMINAL LAW:</u> Topic: <i>Gang Suppression</i> Speaker: Sgt. Rodney Rego, Stockton P.D. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, February 22, 2014 – 10:30 a.m. to 12:00 p.m.		
<u>PROBATE/ESTATE PLANNING:</u> Topic: <i>Protecting Assets from Medi-Cal Recovery</i> Speaker: Randy Rosa, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>TRANSACTIONAL LAW:</u> Topic: <i>Bankruptcy Basics & Chapter 9 - Cities Bailing Out Through Bankruptcy</i> Speaker: Diane Mecca <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, February 22, 2014 – 4:00 p.m. to 5:30 p.m.		
<u>FAMILY LAW:</u> Topic: <i>Pre- v. Post- Nuptial Agreements – Which is Better?</i> Speaker: Stacy Speiller, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>CIVIL LITIGATION:</u> Topic: <i>Advanced Discovery - Withholding Documents & Privileges</i> Speaker: Weldon J. Mattos, Jr., Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

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Send a self-addressed, stamped envelope if you wish confirmation of your reservation.

PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"

Speakers and Topics are Subject to Change

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is a paralegal qualified to act as such under Section 6450 of the Business and Professions Code of the State of California, and is also an assistant. Ms. Morales-Hernandez has a degree from Healds College, regularly attends seminars/classes for continuing education, is bilingual in Spanish, and is a Notary Public. She currently holds a Board Position as Governor of the San Mateo County Legal Secretaries Association (SMCLSA), was President for two years in 2010-2012, and held various board positions prior to becoming President. Ms. Morales-Hernandez previously worked for nine years at Carr, Yeley & Associates, in Redwood City, CA, with a strong background in Family Law.

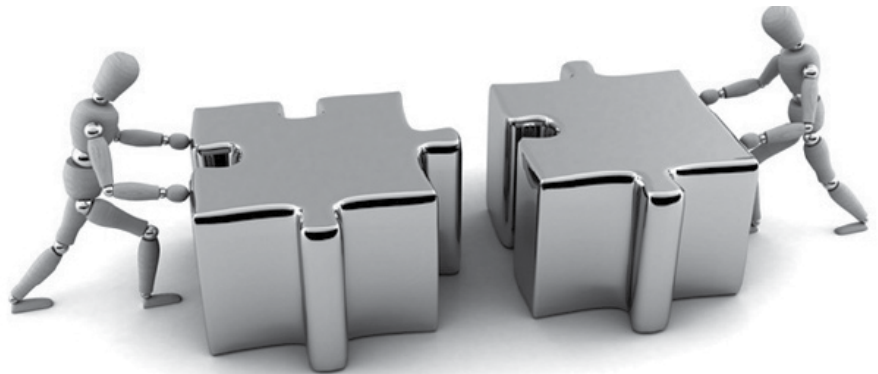
Ms. Morales-Hernandez was born in Managua, Nicaragua, came to the U.S. in 1973, and still has some family back home but has only gone back once in 1977. She has two teenage kids, a boy and girl, which are the world to her.



WORKING AS A TEAM

BY MARIA MORALES-HERNANDEZ
SUBMITTED BY SAN MATEO COUNTY LSA

It has always been my experience that when working with a group of people, whether it's your family, office, or friends---it's best when we work as a team. That being said, I have recently started working at a larger law firm and I went from supporting one attorney to supporting 3 attorneys. I also went from 3 staff members to 12; that's huge when you're not used to having that many people working with you. Lucky for me I come from a big family, 4 siblings and lots of cousins; growing up meant that we had to share and learn how to get along. So what it all boiled down to was that I needed to make some adjustments, in terms of working with more people.



I came to my new office with an attitude of, "I'm here to work on your team." I believe that it has been helpful to all the staff and attorneys. I believe that when a group of people consider themselves a team, we thrive. It's not about who did it wrong, let's see how we can fix it. A positive attitude toward everything you do in life is the best attitude to have -- I know, it's easier said than done, but it is possible.

Here's a list of advice I came across on how to get along better when we apply this to our everyday lives.

1. **Heads up.** When people talk to you, don't continue tapping away at your keyboard. Instead, give the person the gift of your undivided attention, if only for a minute. It sounds like a small thing, but the art of truly paying attention is a dying art, and if you excel at it, you will stand out.
2. **Listen actively.** Many people don't express themselves well. You may need to look beneath the surface of their words to get to the core of what they're trying to say. Be a little patient, and don't interrupt, or jump on small mistakes.
3. **Show (sincere) interest.** You may not want to be BFFs with your cubicle mate, but it won't kill you to ask, "How was your weekend?" Listen for a couple of minutes, and then turn back to the work at hand. Now, was that so hard?
4. **Assume goodwill.** Most people are sincerely trying to do a good job. So no matter how stupid or incompetent or misguided your colleagues' actions might be, consider the possibility that they believed they were doing the right thing at the time. Try to look at the situation from their perspectives. You might learn something. At the very least, you'll earn their gratitude.
5. **Share credit.** Even if a success was all your idea, you will look like even more of a winner if you share the glory. Besides, does anybody really ever accomplish something entirely on their own?
6. **Be open to the possibility that you might be wrong.** Hey, it's possible. At least accept that there's room for improvement. Your ideas and work will benefit from the input of others. Really.

Continued on page 25



DIANE M. MECCA

is a certified paralegal, Stanislaus County LPA Governor and February 2014 Conference Co-Chair. She is also the Program Director (since 2004) and an Instructor of the Certified Paralegal Program at Abrams College. She currently works for the Law Office of James Mootz, Esq. and lives in Modesto, California.

Calling all LSI Members – Join Stanislaus County LPA and Merced County LPA for a “Weekend in Europe”

DIANE M. MECCA, STANISLAUS COUNTY GOVERNOR AND FEBRUARY 2014 CONFERENCE CO-CHAIR

Stanislaus County LPA and Merced County LPA have again teamed up to co-host the LSI 3rd Quarterly Conference to be held February 21–24, 2014, in Modesto, California. Our team of “travel agents” have been working hard to prepare, and to ensure your “Weekend in Europe” will be fun, informative and memorable.

The conference will be held at The Doubletree Hotel in downtown Modesto. Located near the hotel is a grocery store, bus station, George Lucas Movie theatre, plenty of downtown restaurants, and shopping boutiques. Also within walking distance is the Gallo Center of the Arts. Are you excited yet? At least it's not in the middle of summer, in the valley heat. No, we don't have any large local attractions or rides, no world's largest shopping mall, no “Old Town,” and they even closed the Starbucks across the street from the hotel. But, not to worry. Our mission is to keep you busy, having fun, and providing you with plenty of options, so that you will not even want to leave the hotel.

You can make your reservations directly with the hotel, by calling (209) 526-6000. The room rate is \$109 (plus applicable taxes and fees) for a single, double or triple. Self parking will be free in the parking garage across the street from the hotel, attached by a walkway. Valet parking is available for \$12 a day. To get to the hotel, you have several options,

as Modesto is pretty much the center point in California. There is a local airport in Modesto, and the hotel does have a complimentary airport shuttle service to the Modesto Airport. Other international airport options include Sacramento International Airport, 90 miles north; San Francisco International Airport, 92 miles west, or Fresno Airport, 98 miles south. Other airport options could be San Jose, Oakland, or Stockton. If you are driving, we are right off Hwy. 99, and a pretty easy drive, regardless of which direction you are coming from.

To kick off the conference, we will be spending Friday night in Amsterdam, where we will have plenty of good eats, and maybe some surprise entertainment for those willing to partake in the festivities. Unlike the “Real” Red Light District, cameras and photos are allowed at our event. So, be ready, you never know what can happen.

Throughout the weekend, we will have some GREAT speakers lined up for the LSS seminars. Here is your opportunity to receive CLE credits,

and to enhance your knowledge in an area of your interest.

We are also going to be having a “Decorate a Shoe” contest. If you remember the last conference we had in Modesto, we had the “Rubber Duckie” contest. We had a lot of fun with that contest, and we had plenty of entries to judge. We are going to kick that off again, this time, having members bring their most creatively decorated “shoe.” The “shoe” can be a flip flop, a boot, a flat, a wedge, a heel (don't ask me how I know all those) or my favorite, a stiletto. So, let your creative juices flow, and bring your decorated shoe for judging! Good luck. Throughout the weekend, remember to stop by and visit the wide variety of vendors, and try your luck at the raffle.

For members attending one of the Saturday lunches, we will be traveling to Italy to enjoy a fabulous Italian lunch. If you are not a Governor or a President, you may want to attend the Membership Luncheon.

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WEEKEND IN EUROPE

Continued from page 24

For Saturday night Banquet, we will be visiting London. You will have your choice of three wonderful dinner selections, but what could be more fitting than Fish & Chips while visiting London. For Sunday morning brunch we will be back in the Good Ol' US of A. You will have an All-American breakfast before you head home from your European travels.

Stanislaus County LPA and Merced LPA are excited to host the February 2014 in Modesto, California, and we look forward to a providing you with a weekend full of educational opportunities, loads of fun and laughs, and getting together with special friends. If you should have any questions about the conference, please feel free to contact either of the co-chairs, Diane Mecca at dianemecca@hotmail.com or Stephanie Harrison at Stephmjb@sbcglobal.net

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WORKING AS A TEAM

Continued from page 23

7. **Honor your commitments.** Be the kind of person who says he'll have the report done by Tuesday and has it done by Tuesday. Reliability and integrity not only make you look good, they're contagious and will contribute to a constructive work environment.
8. **Show appreciation.** Even though it may be someone's job to supply you with, say, paper clips, when that person delivers the paper clips, say "thank you." It costs you nothing, and it fosters an atmosphere of civility.
9. **Speak to others in a clear, direct, respectful, pleasant, and positive way.** It inspires your coworkers to treat you likewise.
10. **Finally, don't expect to like everybody.** And don't expect everybody to like you. As with any group of people, you're going to get along with some better than others, and there may be a few you just can't stand. Be tolerant. Pick your battles. Sometimes it's just enough that the work gets done.

Karen Burns is the author of the illustrated career advice book *The Amazing Adventures of Working Girl: Real-Life Career Advice You Can Actually Use*, recently released by Running Press. She blogs at www.karenburnsworkinggirl.com.

Lastly, I'd like to share with you Ellen DeGeneres' saying when she ends her show, "Be kind to one another" -- great concept! LS



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JUDGE HOWATT

is a Fifth Generation Californian born in San Diego. He graduated from Fallbrook Union High School and went on to the University of California at Berkeley, receiving a Bachelor's Degree in Political Science in 1965. He then attended the University of San Diego School of Law, receiving a Juris Doctorate in 1968.

Judge Howatt is married to his wife of 47 years, Charlotte, and they have two grown daughters.

Judge Howatt's legal career included over ten years as a Deputy District Attorney for the County of San Diego, including felony trials, the Fraud Division and the Appellate Division. The Fraud Division cases included Bank and Securities frauds and theft of almost one million gallons of gasoline from the Mission Valley Tank Farm.

Judge Howatt was appointed to the El Cajon Municipal Court in 1979 by Governor Edmund G. Brown, Jr., and to the San Diego Superior Court in 1987 by Governor George Deukmejian. In the Superior Court, he served as Presiding Judge of the Court in 1996 and 1997, served on the Appellate Division of the Superior Court, and culminated his career on the bench as Supervising Judge of the Family Law Division of the Court. He retired from the Bench in December 2006. Since retiring he does arbitrations and mediations with JAMS (Judicial Arbitration and Mediation Service) in San Diego.

Both Judge Howatt and Charlotte have a special interest in the History of the State of California. Charlotte was a Fourth Grade teacher until her retirement, and that interest filled her classroom.

Judge Howatt is Vice President of the Old Town Courthouse Corporation which maintains the replica First San Diego Courthouse. He also serves as Chairman of the City of San Diego Ethics Commission and previously served on the California Judges Association Ethics Commission.

He is a founding member of the Family Law College of Trial Advocacy of the San Diego County Bar Association, where he teaches the Law of Evidence to attorneys in Family Law Practice.

CLIMBING THE LADDER TO SUCCESS

BY HON. WILLIAM J. HOWATT, JR. (RETIRED)
SUBMITTED BY SAN DIEGO LSA

The San Diego Union editorial began: "It is high time for San Diego to cease to be a house divided against itself. No city can make progress when bickerings and down-right hatreds prevail and when neighbor is arrayed against neighbor. It was hoped that with the recent municipal election relegated to history, the animosities that were engendered during the campaign had been buried forever." (May 5, 1905).

This was the Union's concession editorial having been on the losing side of the Capitan John L. Sehon and Dan F. Jones mayoral contest of 1905. The mayoral election of 2005 is not the first San Diego mayoral election to be decided in the courts.

The 1905 election had a different twist. Prior to the election day of April 4, 1905, the *San Diego Union* and the *San Diego Tribune* strongly supported Dan F. Jones for mayor. These newspapers, as well as some municipal corporations, were owned by the Spreckels Brothers, who were staunch Republicans and significant political backers in the community. Sehon was

an Independent who had served in the United States Army and retired at the rank of Captain.

At the head of the opposition was former Mayor D. D. Reed. Reed was a real estate entrepreneur who believed the Independent Sehon to be an obstructionist. Reed argued that Sehon was not qualified to hold the office of mayor as he already held a "lucrative office" (retired army officer) and therefore could not qualify for the office of mayor. The argument was that since Sehon received a retirement from the Army, he held a "lucrative office" and therefore, under the California Constitution of the time,

could not be eligible to any civil office of profit under this state (Article IV, Section 20 of the California State Constitution).

These arguments appeared almost daily in the *Union* and the *Tribune* the week or so before Election Day. Opposing articles arguing that Sehon was qualified for office were published in the *San Diego Sun*. Sehon won the election by over 600 votes and was sworn in as soon as the vote was certified by the City Council.

Reed brought suit to have Sehon declared ineligible for the office and to

Continued on page 27

have the election annulled. Judge E. S. Torrance of the San Diego Superior Court heard the trial and declared Capitan Sehon ineligible to take office and annulled the election.

Capitan Sehon outflanked his opposition. He had been sworn in as the mayor-elect as soon as the votes were certified by the City Council. According to Judge Shelley J. Higgins in his book, *This Fantastic City San Diego*, Sehon literally climbed the ladder to success. On the advice of counsel, Moses A. Luce, Sehon removed himself

from the city in order to avoid any service of process regarding the challenge. A Deputy Sheriff searched in vain for him but could not find him. Sehon's term of office was to begin on May 1, 1905.

Guards were posted around the City Hall at Fifth and G Streets to serve Sehon if he attempted to enter the mayor's office. Shortly after midnight, Capitan Sehon and Edgar Luce took a long ladder to the City Hall and put it against the window sill of the Mayor's office. Sehon climbed

the ladder and "broke" into the office so that when the office opened the next morning, Mayor Sehon was in his office and in command.

The Court of Appeal ultimately reversed the ruling of Judge Torrance and Capitan Sehon served his two-year term as Mayor, after which he was again elected to the City Council.

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"Tips & Tricks to Get You Through the Exam"

Third Quarterly Conference, February 21-23, 2014

Doubletree Hotel Modesto, Modesto, CA

Saturday, February 22, 2014, 7:30-8:30 a.m.

Cost: \$5.00 for LSI members/\$10.00 for non-LSI members

Are you planning to take the CCLS Exam in March 2014? Does the thought of sitting for the Exam make you nervous? Attend this CCLS Workshop to get some tips and tricks that will help alleviate some of your concerns and get you through the exam, especially the last couple of weeks before the exam, during the exam, and after the exam.

REGISTRATION DEADLINE: February 14, 2014

Name: _____ Email: _____

Address/City/State: _____

Phone (Work): _____ Local Assn.: _____ LPA/LSA

Please make check payable to LSI. Mail registration to Terrie Quinton, CCLS, c/o Duckor Spradling Metzger & Wynne, 3043 4th Ave., San Diego, CA 92103, and email registration to quinton@dsmw.com.

CCLS CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



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WITH
MT. DIABLO LEGAL PROFESSIONALS ASSOCIATION
MAY 15-18, 2014
LSI ANNUAL CONFERENCE
HILTON HOTEL
CONCORD, CALIFORNIA

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Local Association: _____ LSA/LPA (Full Name) _____

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Please Check if You Are:

☐ Governor ☐ CCLS ☐ PLS

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	<u>By Check*</u>	<u>By PayPal/Credit Card*</u>
Postmarked on or Before April 15, 2014	\$120.00	\$125.00 \$ _____
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Registration by April 15, 2014	_____ @	\$20.00	\$21.00	\$ _____
Registration April 16, 2014, or Later	_____ @	\$30.00	\$31.50	\$ _____
Welcome Reception (Friday)	_____ @	\$25.00	\$26.00	\$ _____
Governor's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
President's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
Newcomer's Luncheon (Friday)	_____ @	\$35.00	\$36.50	\$ _____
CCLS/Member Luncheon (Saturday)	_____ @	\$35.00	\$36.50	\$ _____
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Total Amount PAID				\$ _____

* To pay by PayPal, visit MDLPA's website, www.mtdiablolpa.info, and follow the link to "PayPal." To pay by Credit Card, fill out the attached Credit Card Authorization form. A discount is given for payment by check. Checks should be made payable to "MDLPA."

Mail Payment and this form to: Natalie Chop, CCLS, 1334 Louisiana Drive, Concord, CA 94521.

Check All That Apply:

_____ Vegetarian Meal(s) Requested
_____ Food Allergies: _____

For General Information Contact:

Registration Chair – Natalie Chop, CCLS, (925) 817-3868, natlovesmarykay@yahoo.com or
Conference Co-Chairs – Maria Bishop, CCLS, (925) 284-7788 – maria@mtdiablolpa.info or



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Group Code: LSI
Phone Number: (925) 827-2000

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Conference Co-Chairs – Maria Bishop, CCLS, (925) 284-7788 – maria@mtdiabloipa.info or
Cristina Moreno, (925) 939-9933, cmoreno@angius-terry.com

HOTEL REGISTRATION DUE BY MAY 1, 2014



JENNIFER L. PAGE, CCLS, has been in the legal field since 1989, starting out as a legal secretary to a bankruptcy attorney. She obtained her Paralegal Certification from St. Mary's College, Orinda, CA in 1991. Jennifer worked with J. Frank George for 15 years representing Plaintiffs in wrongful death, medical negligence, and personal injury cases. Jennifer joined the firm Ragghianti Freitas LLP in 2012 and has embarked on the next adventure in her career working for five partners of the firm and learning new areas of law.

Jennifer has been a member of Marin County LPA since 1990 and has held virtually every officer and chairmanship position. Marin County LPA presented her with Honorary Life Member status in 2001. Jennifer began serving LSI in 1999 when she was appointed as the Legal Procedure Chair and continued to serve LSI until she was elected Treasurer in 2010. In May 2008, President Lorraine Betencourt, PLS, CCLS, presented Jennifer with the President's Award. She is currently serving as LSI Executive Secretary.

Jennifer obtained her CCLS designation in October 2008.

Jennifer resides in Novato, California, with her husband of 19 years, Tony, their 12 year old daughter Emma, Olive the pug, Midnight the cat, Sheldon the hamster, and multiple fish.

DUTIES OF BEING A GOVERNOR

BY JENNIFER L. PAGE, CCLS, LSI EXECUTIVE SECRETARY AND HONORARY MEMBER OF MARIN COUNTY LPA

We are half way through the fiscal year but, before you know it, election time will be upon us all. Are you thinking of running for the office of Governor for your association? Has someone in your association suggested you run for the office of Governor? If you answered yes to either question: Are you familiar with all the duties and chores that are required of this position? Hopefully this article will answer most of your questions and provide you with some insight into what being the Governor entails.

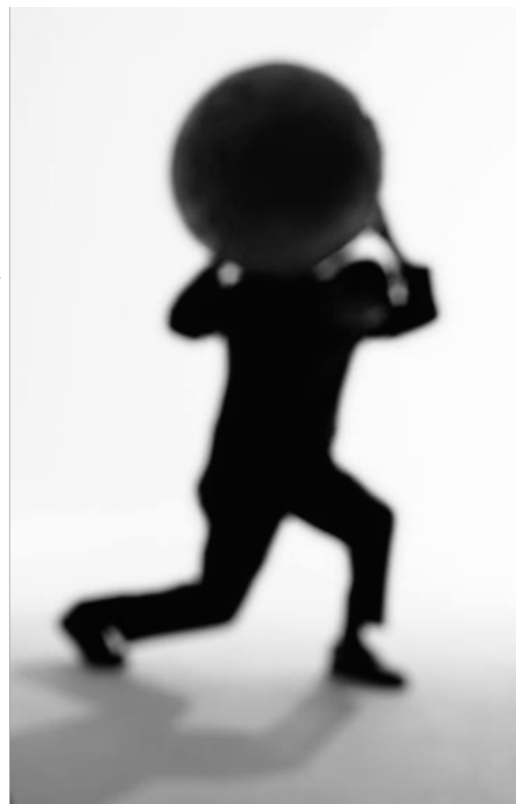
Serving your association as Governor is a vital and important position that needs to be taken seriously. As Governor, you are the direct link between LSI and your local association and its members. As Governor you are tasked with relaying information from LSI to your board members and membership. You are responsible for ensuring that your association's voice is heard.

You have the responsibility of voting on behalf of your association at all meetings of the Board of Governors. Sometimes it is impossible to know in advance everything that will be discussed at these meetings, and you must use your best judgment.

Corporate Office typically sends out all correspondence, notices, etc. on behalf of the members of the Executive Committee and LSI Chairmen. It is your responsibility to ensure that

any correspondence, notices, etc. are disseminated to the appropriate members of your association. In the case of notice of amendments to bylaws or standing rules, other types of motions, election notification, and directives, you need to alert your board and appropriate members as soon as possible and bring these items up for discussion at your next meeting. It is probably best to check with your board first and they will help decide how to best disseminate the information received.

Once elected as Governor, your association must complete and return the Certification of Governor form provided in April. The form is to be returned to the LSI Executive Secretary with a copy sent to Corporate Office. If for any reason the Governor of your association changes, a new Certification of Governor must be completed



and returned to the LSI Executive Secretary with a copy to Corporate Office.

Prior to each conference, the Official Notice and Notification of Attendance are distributed. It is imperative that you complete the Notification of Attendance, whether your association will be represented or not, and send the form

Continued on page 31

DUTIES OF BEING A GOVERNOR

Continued from page 30

in timely to the LSI Executive Secretary. The Notification of Attendance does not go to Corporate Office. The LSI Executive Secretary is in charge of creating the Official Roll Call for each Conference and for ensuring that a quorum will be present should any issues come before the corporation that may require a vote of the governors. Sending in your notification two days before conference is not sufficient.

Advise and discuss with your association all proposed amendments to LSI Bylaws sent to you by the LSI Parliamentarian. It is suggested that they be discussed with your local parliamentarian before presentation to your board and/or membership. Your association probably will vote to instruct you concerning its desire to amend, adopt, or reject such amendments.

Additionally, you may use the Notification of Attendance form to request that a specific LSI Officer or Chairman attend the Governors Luncheon to address a specific topic, or you may simply request that a specific topic be added to the Agenda for discussion with the Governors. Failure to submit Notification of Attendance will prevent your Governor from being seated at Conference and prevents your association's vote from being counted.

At quarterly conferences, during the Board of Governors meeting all Governors are asked to sit at the front of the room. If you wish to address those assembled, please use the microphone; introduce yourself and the association you represent. It may be daunting to go to the microphone, but I guarantee that if you have a question on something, so does someone else. Changes cannot be made, errors cannot be corrected, and improvements cannot be made, if everyone sits on their hands and says nothing.

At Annual Conference, as Governor you attend the Pre-Board of Governors Meeting, the General Assembly, and the Post-Board of Governors Meeting, again sitting at the front of the room. During the General Assembly, only delegates are assigned seating.

Governors Luncheon: This is an opportunity for the Governors to review the Executive Committee Resume and any recommendations made, in detail. Every Governor is encouraged to discuss items about which they are confused, concerned, or are just plain curious. If you have an item to discuss, please stand when recognized, and announce your name and association. I know standing can be difficult for some, but it allows those present to hear you more clearly. If there are other items on the Agenda, then those are discussed as well.

When the Board of Governors meeting reconvenes after the luncheon, the EC Resume is once again discussed. If you asked that a specific item be discussed or clarified during the luncheon, then it is your responsibility to go to the microphone and renew your question so that all present can learn what was discussed during the luncheon.

I strongly encourage you to take notes during the Board of Governors meeting and luncheon. This will help you prepare your written and oral report of the actions that occurred during Conference. Be prepared to answer questions from your membership. Additionally, ensure that the local chairmen receive a copy of the report of their LSI counterparts so they are aware of what's going on with LSI.

Chapter Achievement Contest: This chore typically falls to the Governor. I suggest you go to the LSI website and print out the most current contest form and rules. Some associations have

tailored the entry form to the activities their association participates in. Distribute the form to your members and encourage them to keep track of their activities throughout the year. One of the most important items that is part of the Chapter Achievement Contest is responding to Directives timely. All Directives are sent to the Governor for distribution to the local association counterparts. Remind each local chair to complete their directive, give them the deadline, and ask that they copy you on the form when responding to their state counterpart. This will help you keep track of the points earned.

If your association has a Governor-in-Training, I would encourage them to attend the February Governors' Luncheon to get a feel for what happens during the luncheon, as well as during General Assembly.

Remember LSI is here for the benefit of its membership. If there are issues that need to be addressed or suggestions to be presented, this is your opportunity to bring them before the members of the Executive Committee and the rest of the membership of LSI.

I encourage you to be Governor of your association. It's a challenging, fun, and rewarding experience.

LS



KARLA PETERSON,

the San Diego Union-Tribune critic at large, is a longtime San Diegan whose U-T San Diego beats have included TV criticism, pop-culture, Comic-Con, and San Diego people and lifestyles. She has won awards for entertainment criticism from the American Association of Sunday and Features Editors. A graduate of San Diego State University, she has been with the U-T since 1985.

CHARITY SPOTLIGHT

BY KARLA PETERSON
SUBMITTED BY SAN DIEGO LSA

As a 19-year-old single mother without a job, a high-school diploma or a place to live, Chaunce Cowan knew she needed help. And when a spot opened up in Home Start's Maternity Shelter Program — where struggling young mothers get a place to call home and the support to get their lives on track — Cowan she knew she was lucky to get it.

When the Home Start staff suggested she meet with a mentor, however, Cowan was pretty sure it was the last thing in the world she would ever want to do. But after just a few minutes with Kathy Gumm, Cowan knew she was wrong.

"At first, I did not want a mentor. I thought there was no point in having one," Cowan said, settling into the couch in the Normal Heights Maternity Shelter bungalow she shares with daughter Laneice, who turns three next month. "But we met at Phil's BBQ, and I saw that we had similar backgrounds and she could really understand my life. It was really cool."

Gumm is a 55-year-old legal secretary with a career she loves, two grown-up children she is proud of and memories of surviving young single motherhood that she is happy to share. Even if the road to wisdom was

often no fun at all.

"When I started reading about this program, I thought, 'Whoa, this is something I can relate to,'" said Gumm, who takes Cowan and Laneice out for regular dinners, drives Cowan to job interviews and advises her on everything from applying for subsidized housing to how to get a student bus pass. "I wanted to share my story. I wanted to let her know that there will be up times and down times, and easy times and hard times. But you just need to stand firm and be the best mom you can be."

Founded in 2009 as part of a pilot program funded by the United Way, Home Start's Maternity Shelter Program gives at-risk young mothers safe and secure housing, child-care, parenting education and help finding jobs, finishing high school or starting college.

Earlier this year, MSP added volunteer mentors to the mix, hoping that strong, successful women could be a source of inspiration for girls whose lives have been long on hardship and short on role models. After hearing about the Home Start maternity program through the San Diego Legal Secretaries' Association, Gumm decided she wanted to be one of those women. And she knew what it would take.

Born and raised in Louisville, Ky., Gumm gave birth to her daughter, Wayneshia, when she was 15. Busy with college and then the Army, the baby's father was never really in the picture. But Gumm's mother sure was.

When her teen daughter got pregnant, Florence Mitchell insisted she keep going to her regular high school



CATHY GUMM AND CHAUNICE COWAN, PHOTO CREDIT: ANDY WILHELM

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CHARITY SPOTLIGHT

Continued from page 32

instead of hiding out in the special school for pregnant girls. When Wayneshia was born, Mitchell offered to take care of her every day, as long as Gumm stayed in school.

Florence Mitchell drove a hard bargain, and the payoff was worth it.

"My mother was very strict and very old school," Gumm said. "She was determined that I was going to be a mother to my daughter and that I was not going to sit around getting food stamps and being on welfare. I guess my mother was my Home Start."

After studying computer science at the University of Louisville, Gumm packed up Wayneshia and moved to California in 1978. They lived with relatives in Santa Ana, and Gumm got a secretarial job. Then she started taking paralegal classes at Santa Ana College, and the scattered pieces of her challenging life took gratifying shape.

Classes lead to a career, which took her from law offices in Orange County to firms in San Diego. Wayneshia is now a married mother of three with a Ph.D from San Diego State and a counseling job at San Diego City College. Gumm's 28-year-old son, Jaye Dale, is an engineer at Hewlett-Packard. As a mother, Gumm's work is more or less done. As a mentor, the adventure is just beginning. And it promises to be another good one.

"Hopefully, Chaunice can take what I've learned and learn from it, too," said Gumm, who was married to William Gumm for 26 years before his death in 2010. "Things like the importance of school, and that a job is not just about a paycheck, it's about the future. I thought I could help her stay motivated and show her it is possible to succeed. The proudest day of my life was when my daughter graduated from college."

From her end of the couch, Cowan looks at the woman in the spiffy navy-blue suit and shiny red pumps and smiles the stunned smile of the recently converted. She's got the right person on her side now. She just knows it.

"Look at where she is now," said Cowan, who is getting her GED and working as a telemarketer. "She's got a great job and she's volunteering to talk to me. She isn't even getting paid."

Then it was the mentor's time to grin.

"I get paid by watching you grow." **LS**

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PATRICIA PARSON

Continued from page 7

ists, the Eastern Alameda County Bar Association and the Earl Warren American Inn of Court. She eventually wanted more time for herself, so she retired, but continues working part-time as the Executive Director for the Alameda Contra Costa Trial Lawyers Association.

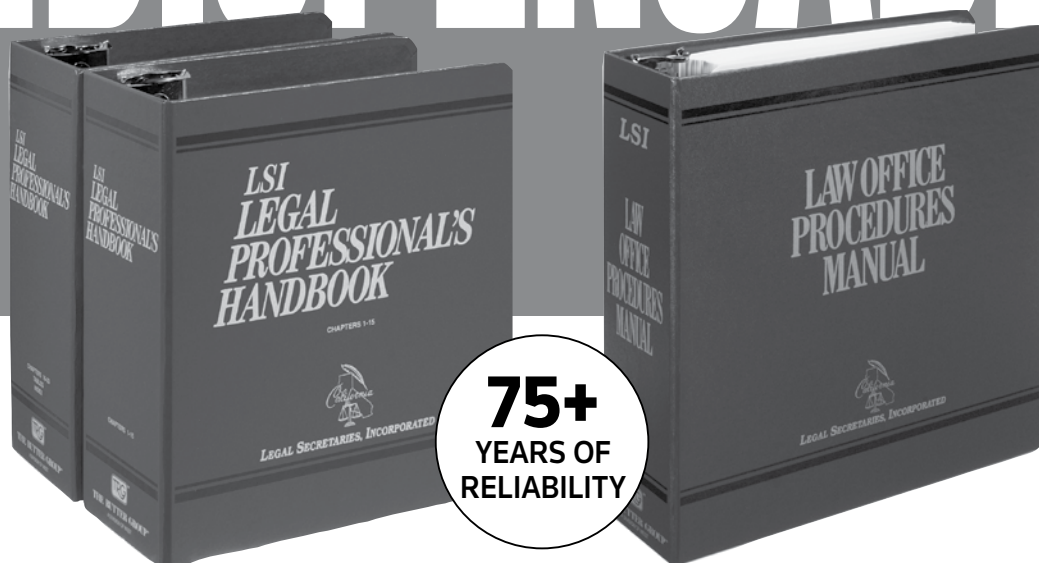
Suzanne Allen created the President's Award during her term as LSI President. Alameda County LSA followed her tradition and Pat was privileged to be the first recipient of the award from Alameda County LSA. She also received the President's Award from Caroline Van de Pol in 1991. She

was also privileged to be a recipient of the Hall of Fame Award given by the Association of Certified Family Law Specialists. This award is only given to attorneys and the Bylaws were amended to honor Pat. Additionally, Pat received the "Above and Beyond" award from the Alameda Contra Costa Trial Lawyers Association. Only four have been given this award since the inception and in 2003, and it speaks volumes about Pat as she was honored to be one of the recipients.

Pat has thoroughly enjoyed her involvement with LSI and with her local association. When promoting

membership, she will always point out the wonderful friends she has made over the years and yet the only common bond is the legal profession. What a tribute to LSI! Thank you for sharing your story, Pat. **LS**

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Guidelines for Submission of Articles to *The Legal Secretary*



Dear Friends,

I hope that you enjoyed the holidays and that you are all sticking to your New Year's resolutions.

I do want to take a moment to thank our members for providing some very interesting articles in 2013 and I also want to thank many of you for the kind notes you have sent my way with respect to the magazine. Always remember that this is your magazine and its success depends on you.

I also want to thank all of the bulletin editors for sending their bulletins to me. I have thoroughly enjoyed reading your bulletins and keeping up with your associations' activities.

I would like to extend my thanks to Don Lee and Esperanza Larios for their photo submissions

in this issue. I would also like to extend my warmest thanks to my proofreaders, Terrie Quinton, CCLS, Annie Parrish, CCLS and Debbie Frias. And most importantly, I would like to express my deepest thanks to our designer, Lori McElroy, for another exceptional issue.

Do you have something you'd like to see published? If so, please send it my way.

See you in Modesto!

Michelle

"We delight in the beauty of the butterfly, but rarely admit the changes it has gone through to achieve that beauty."

- Maya Angelou

Deadlines for Receipt of Articles by Editor

1. August issue (First Quarter) June 1st
2. November issue (Second Quarter) September 1st
3. February issue (Third Quarter) December 1st
4. May issue (Annual/Fourth Quarter) March 1st

Suggested Topics for Articles

5. Legal procedures
6. Law office management procedures
7. Word processing/computer hints/technology/internet/world wide web
8. Office equipment/environment
9. Personal safety
10. Career promotion
11. Keynote cases
12. CCLSs are encouraged to submit articles about their experience as a CCLS and/or pursuit for certification – e.g., CCLS mock exam (with answers)
13. Information about our publications: LSI Legal Professional's Handbook; Law Office Procedures Manual; The Legal Secretary magazine
14. Any Specialization area (Civil Litigation; Criminal Law; Family Law; Law Office Management; Probate/Estate Planning; Transactional Law) and appellate articles as well
15. Photographs and/or articles regarding the success of association(s) event(s) (how, when and why successful)
16. Other topics of general interest to the legal community

Submission Guidelines

17. Articles must be submitted by email as an attached document using word processing programs such as Microsoft Word or WordPerfect and saved as "doc", "txt", "wpd" or

"ASCII" file. When sending email, include in subject line: "[Last Name of Author] and [contents]", "i.e., Smith - Article, Bio and Photo.

18. All articles submitted must be at least 500 words and no more than 2500 words.
19. Articles sent in PDF format are not acceptable.
20. All articles submitted must be accompanied by the name, email address, contact information of person submitting the article, and name of submitting Association. Articles that do not have this information cannot be considered for publication.
21. Type all copy in Times New Roman 12 point type to fit across an 8-1/2" x 11" page, single spaced. Avoid using style attributes such as bold, italic, centering, columns or tabs.
22. Articles are subject to approval and/or editing. Editor cannot guarantee publication in any given issue, although every effort will be made to publish as soon as possible after acceptance.
23. Articles submitted and published in The Legal Secretary become the property of LSI unless prior agreement is obtained by the authors

Photographs

24. Digital photography is required and must be a resolution high enough to guarantee at least 300 dpi at 100% scale.
25. The subject should be either horizontally or vertically positioned. Centered, straight-on shots are preferred. If you use a flash, direct it away from the subject to avoid glare; or move a few inches left or right of center to eliminate glare.
26. If you submit photographs other than your own, please indicate the source and include any letters of permission for publication in the magazine.

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CCLS BROCHURE Tri-fold brochure promoting the benefits of taking the CCLS Exam. (Rev. 12/11)	N/C		
CCLS STUDY GUIDE (Revised 2012) Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	25.00		
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CCLS STUDY KIT SECTIONS All sections include suggested 10 and 18 week syllabi.			
CALIFORNIA LEGAL PROCEDURE (CLP) CLP Section of CCLS Study Guide, CLP Worksheets, CLP Study Tips, List of Additional references required for CLP	30.00		
LEGAL TERMINOLOGY (LT) California Style Manual (book included with section), LT Section of CCLS Study Guide, LT Worksheets, LT Study Tips, list of additional references required for LT	50.00		
LEGAL COMPUTATIONS (LC) LC Section of CCLS Study Guide, LC Worksheets, LC Study Tips, list of additional references required for LC	30.00		
SKILLS (SK) SK Section of CCLS Study Guide, SK Worksheets SK Study Tips, List of additional references required for SK	30.00		
ABILITY TO COMMUNICATE EFFECTIVELY (ACE) Gregg Reference Manual, 11 ed. (book included with section), ACE Section of CCLS Study Guide, ACE Worksheets, ACE Study Tips, list of additional references required for ACE	99.00		
LAW OFFICE ADMINISTRATION (LOA)** <i>Pocket Guide to Legal Ethics</i> (book included with section) Secretary of State Notary Public Handbook, LOA Section of CCLS Study Guide, LOA Worksheets, LOA Study Tips, list of additional references required for LOA	70.00		
REASONING AND ETHICS (R&E)** <i>Pocket Guide to Legal Ethics</i> (book included with section), California Rules of Professional Conduct, Secretary of State Notary Public Handbook, R&E Section of CCLS Study Guide, R&E Worksheets, R&E Study Tips, list of additional references required for R&E	70.00		
**If LOA and R&E are purchased as individual sections at the same time, there is a \$40.00 discount because the same reference book is included in both sections.			
COST OF FULL STUDY KIT (ALL 7 SECTIONS)	199.00		
GUIDELINES FOR HOSTING LSI CONFERENCES* An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 12/09)	N/C		
GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 11/11)	5.00		
HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES* A booklet with step-by-step directions, including rules and examples, for preparing a History Book for entry in the LSI History Book Competition. Created for local association historians and/or presidents. (Rev. 5/12)	5.00		
HISTORY OF LEGAL SECRETARIES INCORPORATED A 50-page memory of people, places and events since 1929. (Rev. 4/12)	5.00		
LAW OFFICE PROCEDURES MANUAL FLYER An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/12)	N/C		
LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES To assist instructors in conducting training classes. Teacher Training Chapter offers tips for teaching. Other Guides supplement Chapters of the LOPM and contain projects, instructions to student, completed and blank legal forms, exams and answer keys.			
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*Item available to LSI members only.

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