

THE Legal Secretary®

FEBRUARY 2020



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It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

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President's Message

BY HEATHER EDWARDS, LSI PRESIDENT



HEATHER EDWARDS is LSI's President and has been a member of San Fernando Valley Legal Secretaries Association since 1991, the same year she joined the legal field. She obtained her Bachelor's Degree from California State University Northridge. In May 2006, LSI President Mary S. Rocca presented Heather with the President's Award. Heather resides in Northridge, California with her husband of 28 years Ernie, and their 4 children, Kennedy, Koree, Kaden and Kamden.

The Past, Present, and Future of LSI

Individual Commitment to a Group Effort – That is What Makes a Team Work, a Company Work, a Society Work, a Civilization Work. – Vince Lombardi

The Past - According to the History of LSI (a complete version of the History of LSI can be found on our website www.lsi.org/About/WhoWeAre) "...In 1934 representatives from Long Beach, Los Angeles, Pasadena and San Diego met to consider banding together into one association. At the conclusion of a two-day session, the *California Federation of Legal Secretaries* had been organized with the aim of educating legal secretaries in legal procedure and the preparation of a loose-leaf procedural notebook. After organizational details were completed and the Federation was functioning, applications for membership were processed from throughout California. An Out-of-State Membership Chairman was appointed to encourage communities in other states to form similar associations, the seed of a national association being planted. Soon a Code of Ethics as well as a slogan, motto and the official colors of blue and gold were adopted. The Federation flourished and by 1940 had 12 member chapters throughout California. In July 1940 the California Federation of Legal Secretaries formed a California nonprofit corporation known as *LEGAL SECRETARIES, INCORPORATED...*" It has been almost 80 years since the formation of LSI. This month we will vote to change the name of our great corporation, but more on that in 'The Future'.



The Present – San Francisco LPA led by Conference Co-Chairs, Carol Romo and Larry McGrew, hosted an amazing November 2019 Quarterly Conference in San Francisco at the Hilton San Francisco-Financial District.

Conference was kicked off with an educational CEC program, led by J. Cori Mandy, CCLS, CEC Coordinator and featured speaker, Patrick Stokes of Littler Mendelson, P.C. who spoke on "Assembly Bill 5 (AB 5) – Independent Contractors". Friday evening welcome reception theme, "Chinatown" featured dim sum appetizers and was followed by a cable car bus tour that took those that participated to beautifully lit landmarks of the City of San Francisco.

Saturday morning started out with a CCLS Workshop led by Terrie Quinton, CCLS, CCLS Chair which focused on Legal Terminology – Vocabulary. The Board of Governors Meeting was kicked off with three of our LSI Past Presidents (Mary J. Beaudrow, LSI Past President 2014-2016; Diana E. Estabrook, PLS, LSI Past President 1984-1986; and Christa Davis, LSI Past President 2008-2010) assisting with opening ceremonies. The morning continued with a very special guest speaker, The Honorable Robert Freedman (Retired, San Francisco Superior Court). Judge Freedman welcomed everyone to San Francisco and shared some thoughts on the important role we play in the legal industry along with his witty insight that comes from years spent on the bench of San Francisco Superior Court.

Continue on page 3

PRESIDENT'S MESSAGE

Continued from page 2

Saturday morning and afternoon featured six Legal Specialization Section Workshops coordinated by Dawn R. Forgeur, CCLS, LSI LSS Coordinator which spotlighted six incredible and educational topics:

- Probate and Estate Planning (LSS Leader, Carmen Vasques): Topic - Estate Planning for the Other 99%; Speaker, Deborah L. Fox, Esq. of Fox Probate Group.
- Civil Litigation (LSS Leader, Belinda Owens): Topic - Client Interactions for Personal Injury and Employment Cases; Speaker, Scott Herndon, Esq.
- Criminal and Family Law (LSS Leader, Mary Lou Floyd, CCLS): Topic - Impact of Divorce When a PreNup Exists; Speaker, Jane Aceituno, Esq. of The Law Offices of Jane Aceituno.
- Law Office Administration (LSS Leader, Annette Davis): Working with Difficult People in a Law Firm; Speaker, Diane L. Camacho, CLM.
- Federal Law (LSS Leader, Bettina Jacobson): Topic - Fear of Flying in Federal Court: Unique differences between federal and state court litigation; Speaker, Jim Wagstaff, Esq.
- Specialty Law (LSS Leader, Cyndee Saucedo, CCLS): Topic - How the Justice Department Conducts International Investigations of White-Collar Corporate Crimes; Speaker, Marc Siegel, Esq. of Jones Day.

The formal Banquet on Saturday night featured a black tie and black cocktail dress affair led by our Mistress of Ceremonies for the evening, Christa Davis, LSI Past President 2008-2010. After our delicious meal, the LSI Executive Committee teamed up to compete in the first ever and unforgettable Lip-Sync Battle. The karaoke DJ continued the party and everyone enjoyed karaoke and dancing into the night.

Sunday Brunch was centered around the longest running variety show (now closed) in the US, Beach Blanket Babylon ("BBB"). To commemorate this longest running variety show, LSI Associations competed in a hat contest at the brunch on Sunday featuring an oversized hat decorated with landmarks representing each participating association's home town, city, or county. The hats were displayed as centerpieces at the brunch tables and were judged by the LSI Executive Committee. Ribbons and prizes for 1st, 2nd, and 3rd place were announced and awarded at the brunch.

San Francisco LPA hosted a very entertaining and memorable conference that we will remember for years to come.

The Future – Exactly one year ago, I spoke about The Future of LSI in my February 2019 article. I expressed that we are in a very important time for LSI. "We are 'grooming' LSI for the next generation as it is imperative to LSI's future success and retention of members. We need to take the initiative to ensure our great corporation is ready for the next generation of legal professionals – Millennials, Generation

Z-ers, and beyond." I asked, "So how do we accomplish this? Do we change the name of our magazine? Do we change the name of our corporation? These are questions that you will be hearing more about in the coming months for your consideration and discussion. LSI needs to meet the needs of the legal market and at the same time preserve our reputation in providing stellar California legal education and professional development for the legal professional past, present, and future."

Here we are one year later and our Governors are about to vote this month whether or not to change the name of our esteemed corporation. According to the Ad Hoc Committee Report of November 2019 and amended in December 2019 which stated that "...The more critical question for LSI and this Committee is what a new name should be for this organization. Committee members asked members, colleagues, and friends for recommendations. Research was conducted about possible names, names which are not available for various reasons (with the Secretary of State), reasons for name changes, results of name changes, and theories versus consequences of name changes, through online research, interviews with other legal professionals, and review of why other legal associations did or did not choose to change their names. That research is available to anyone who requests it. It led directly to the recent survey sent to all LSI members..." The results from the survey question, "Should LSI change its name" resulted in the following answer: 68.89% were YES responses and 31.11% were NO responses. We will soon know the answer when our Governors will cast their vote on Saturday, February 22, 2020.

Also at the February 2020 Quarterly Conference, LSI will be accepting bids to host the following upcoming quarterly conferences: November 2021, February 2022, August 2022, and the May 2022 Annual Conference. The bids will be voted on at the Post-Annual Board of Governors meeting at the 2020 May Annual Conference in Sacramento. Don't let another opportunity to show off your city, work with your local association members, and hold a conference in your own back yard pass you by.

Candidates for the 2020-2021 LSI Officers will be announced at the February 2020 Quarterly Conference, and elections will be held at the May 2020 Annual Conference. If you have been thinking about serving LSI on the state level, this is a great opportunity to take your leadership abilities to the next level. As I have previously mentioned, it takes a certain level of commitment, professionalism, and desire to make a difference in this corporation. The future of LSI is upon us. We need dedicated, committed, hard-working members of our corporation to make this happen. The future of LSI depends on YOU! We are T.E.A.M.

Looking forward to seeing you in lovely Modesto!

LS



NOVEMBER, 2019 | SAN FRANCISCO, CA

2nd Quarterly Conference





Meet Sacramento Legal Secretaries Association

BY LYNNE PRESCOTT, CCLS

Sacramento Legal Secretaries Association ("SLSA") became the 11th chapter of Legal Secretaries, Incorporated, in 1941. Five years later, SLSA Past President Velma Tougaw, who was then a member of San Francisco LSA (as it was known then), became LSI President and served from 1946-1948. Velma Tougaw was also one of the first female lawyers to graduate from the University of the Pacific, McGeorge School of Law (class of 1938), and she was one of the founding members of the National Association of Legal Secretaries.

Gloria Soares (Massi), SLSA Past President from 1941-1943, had the honor of becoming the 11th President of LSI in 1953, serving until 1955. She returned for another term as SLSA President over 20 years later in 1966.

Throughout its almost 80-year history, Sacramento LSA has been best known for its educational programs, charitable projects, social events, and work within the legal community. As far back as 1955, newspaper clippings from the Daily Recorder and the Sacramento Bee give accounts of fundraisers to help children with disabilities, including an annual luncheon with gifts and a visit from Santa Claus, notices of training classes and educational meetings, an Annual Card Night, and events celebrating judges and Boss of the Year awards. In one article from 1953, the Sacramento Bee advertised SLSA's 12-week training course for legal secretaries, which cost a whopping \$1.00!

Sacramento LSA still values the importance of education and giving back to the community. Each regular monthly meeting features an educational speaker, with a special State Day in Court meeting in January, and a Federal Day in Court meeting in February (the two most popular and well-attended events of the year). The annual Holiday Mock Trial is held in December. Sacramento LSA also conducts Beginning Legal Secretary Training courses, which are always in demand.

In recent years, Sacramento LSA has participated in charity projects for the homeless, Shriners' Hospital, veterans, sex trafficking victims, and provided backpacks for school children. SLSA partners with the Sacramento County Bar Association for Kids Law Day, where attorneys, paralegals, and legal secretaries team up and go out to grade schools throughout the Sacramento area and



share what it's like to work in the legal field. Sacramento LSA's members also assist the Sacramento County Bar Association each year for its Bench Bar Reception.

During the Halloween season, Sacramento LSA is a sponsor of Fairytale Town's annual Safe & Super Halloween, where members volunteer to work the event, providing arts and crafts projects to the children and handing out candy. Each Christmas, in connection with the Holiday Mock Trial, Sacramento LSA collects donations of much-needed items for the homeless and stuffs these items into Christmas Stockings to be distributed to men, women, and children in Sacramento.

One of Sacramento LSA's most fun events is the annual Reno Bus Trip, which also coincides with the Eldorado Great Italian Festival. This event has grown in popularity over the last several years and has been attended by LSI members from all over the state.

While definitely connected by shared interests and Sacramento LSA's mission, many members find the relationships and networking irreplaceable. The term "tribe" can often be heard throughout Sacramento LSA, lending greater impact and significance to these relationships. Many members have created life-long friendships with each other. Our slogan is "When we honor, promote, and educate, we can go beyond all our dreams and expectations." Our color is Gold - golden friendships and the golden rule - education. And our motto is "Honor, Promotion, and Education."

LS



Meet Merced County Legal Professionals Association

25 YEARS OF HISTORY... AND THEN SOME!

BY MARLA M. WEATHERS, CCLS

MCLSA-An Association of Hope and Prosperity. That is the title of an article written about Helen Avis Wright. She was a past president of Merced-Mariposa County Legal Secretaries Association formed in 1964 and that organization disbanded in approximately 1978. Helen was a charter member of Merced County Legal Secretaries Association. She passed away October 4, 1982

Merced County Legal Secretaries Association received its charter at the First Quarterly Board of Governors' Meeting in Palo Alto held August 13-15 1982 and had its Installation of Officers on August 28, 1982. The first slate of officers: President Mary Pish, Governor Kathy Martin, Vice President Linda Pruett, Secretary Cheryl Simons, Treasurer Evelyn Houston, and Parliamentarian Winnie Mitchell. Some of the charter members are still active members of our association including Kathy (Martin) Foster and Dorothy Knox. Many of our Association's past presidents are still active as well – Rhonda Amezua, Stephanie Harrison, Dorothy Knox (MCLPA Lifetime Member), Marla Weathers, CCLS, Lorraine Bettencourt, PLS, CCLS, and Kathy Foster. Merced County Legal Professionals Association (MCLPA) voted to change its name on April 29, 2004.

MCLPA has hosted quarterly and annual conferences from Yosemite to Modesto. Our members have volunteered as LSI section leaders and Lorraine Bettencourt, PLS, CCLS is a Past President of LSI (2006-2008). And who can forget Mr. Hospitality, Don Lee, an Honorary Member of both LSI and MCLPA.

MCLPA has always been involved in education for the legal professionals. According to our archives, Helen Wright established the first educational program for LSI and served as LSI's Legal Procedure Chairperson in 1970. We continue that legacy through programs at our meetings, updates on changes in the law and procedures, brown bag seminars, and other educational programs. Our members attend a wide variety of educational programs and seminars through LSI, MCLPA, our local Bar Association, other local associations, and Bay Area

Forums. As technology advances, we strive to keep up with the changes. We have come a long way from manual typewriters, correcting with chalk, and taking dictation to computers with programs that automatically correct for us and prepare and format documents by speaking to them. No longer do we rush to meet the deadline of printing and distributing our monthly bulletins. There is email and other forms of social media to disseminate information to our members.

For 25 years, MCLPA hosted its annual BBQ at the Horseman's Association in Merced. What a fundraiser that was every year! We continue the tradition of an annual fundraiser but the themes and venues have changed since we had our 25th Silver Anniversary Fundraiser under the stars at the Horseman's. This year we are looking forward to our first spring time fundraiser on April 4, 2020.

Networking is very important to our members as well. Over the years, friendships have developed that last a lifetime. Along the way, we have lost dear friends. Some have moved and others have passed away. But their memories remain in our hearts. And we have made new friends as we encourage others to join MCLPA and take advantage of the benefits offered by our local association and LSI.

Our name has changed to Merced County Legal Professionals Association and we have accomplished many goals since that summer day in August 1982, but the hope is still there and so is the dream of making MCLPA prosper, year after year. Here's to another 25 Years of History... and then some!



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NEWSFLASH

NEW RECERTIFICATION PERIOD EFFECTIVE 2020 – PLEASE READ

In 2017, the Certifying Board made the decision to move the October exam to September to give the Certifying Board enough time to get the results published for November Conference.

In order to avoid the confusion of two recertification periods one month apart, the Certifying Board recently made the decision to only have two certification periods – March and September, to coincide with the exam dates – effective 2020.

This means that those of you who passed your CCLS exam in October of **any year**, and are due to re-certify in October 2020 or in October 2021, will now be required to re-certify in September 2020 or in September 2021. September will be your official recertification period going forward, and recertification paperwork will be due by September 30. Extensions are available for those who may need them, by simply contacting the Recertification Chair (cclsrecertification@gmail.com). (The March recertification period is unaffected.)

Should you have any questions or concerns, please feel free to reach out either to the CCLS Certifying Board Chair (cclscertifyingboard@gmail.com) or the CCLS Recertification Chair (cclsrecertification@gmail.com).

Please also refer to the Standards for Recertification posted on the LSI website for further information/details.



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NEWSFLASH

EFFECTIVE January 1, 2020

CCLS Recertification Mailing Address Change

**Brenda Bracy, CCLS
P.O. Box 938
Galt, CA 95632**

**CCLS Recertification email remains the same at
cclsrecertification@gmail.com**

Board prefers email rather than mail.

**DO NOT send certified/priority/overnight mail to
this post office box. Rather, contact Brenda at
email address above for a physical address.**



CORINNE DLUZAK, CCLS, has been a legal secretary for more than 40 years and has been with her current employer Charlton Weeks LLP in Palmdale for the last 17 years. She's the Vice President and Membership Chairman of San Fernando Valley Legal Secretaries Association. Corinne resides in Lancaster with her husband of 33 years, Ernie. They have 3 daughters - Julianna, Valerie and Roxanne, one son-in-law Mike, and one grandson Mikey. Her favorite time-waster is playing Words with Friends.

Why I Maintain my CCLS Designation

BY CORINNE DLUZAK, CCLS – SUBMITTED BY SAN FERNANDO VALLEY LSA

My legal career started many moons ago in July 1978 after attending two years of community college. I was 19 years old started and working as a trainee at a small firm in Riverside. I stayed there about four years, learned a lot and even attended a couple of Riverside Legal Secretaries Association meetings, but never became a member. In 1982, I decided to relocate to Pasadena and worked at the oldest firm in that city, Hahn & Hahn. In 1983, I chose to go work “in the big city” and landed a job as a legal secretary for a large firm in downtown Los Angeles, Adams, Duque and Hazeltine. During the time I was working there, I met my husband, Ernie. We married in 1986, and I relocated once again to the Lancaster area. It took me a few months to find a job in the Antelope Valley due to the pay difference from Los Angeles to Lancaster (a big cut). Eventually, I got a job as a legal secretary at a small firm, Potter and Reed. Some of my co-workers were members of the Antelope Valley Legal Secretaries Association and they invited me to a meeting. The President of this association was a “CCLS”. She was the first one in the Antelope Valley to have the designation. When I heard what the letters stood for, I knew immediately that I had to have those initials after my name! With some studying, I knew I could pass the test. However, I did not become serious about studying and passing the CCLS exam right away because my husband and I started to have a family in 1989. We have three lovely daughters (Julianna, Valerie and Roxanne) who are now grown and on their own.



In the late 1990s my desire to take the CCLS exam kept gnawing away at me. I then made a goal for myself that when our youngest daughter Roxanne turned three years old, I would buckle down, study and take the test. So, in early 1998, I attended a six-week CCLS study group with some other secretaries in the Antelope Valley who had already passed the test. Lori Young, CCLS, and Vicki LaChance, CCLS, were so wonderful in sharing their knowledge and information with the study group. Even though I had worked in the legal field for 20 years, I learned some new stuff. I still think of these ladies with great admiration for taking the time to lead the study group. I studied and studied, sometimes going to the local library to

have some quiet time. My husband supported my decision to study and take the exam and he watched our daughters while I did so. I took the exam in 1998 in Burbank and passed on my first try. I couldn't believe it because the “accounting” section threw me for a loop and I thought I would have to take that part again. Somehow I passed that section. All I can say is that my guardian angel helped me through that part.

I attended the May Annual Conference in 1998 in Monterey where I and numerous other new CCLSs were honored time and time again for passing the test. I have fond memories of that conference as everyone made me feel so special.

CONTINUED ON PAGE 11

WHY I MAINTAIN MY CCLS DESIGNATION

Continued from page 10

So, I've been a CCLS since 1998 – 21 years! Why do I maintain my CCLS designation? Because I worked hard to get it. I would be really disappointed in myself if I lost those initials. I love my profession and take pride in my work. I do my best to make sure documents are darn near perfect before they go to clients and the court. I enjoy attending seminars and meetings to gain information and keep up with ever changing California law. It's also fun to network and make new friends in the same profession.

So, if you've been pondering about taking the CCLS exam, just do it! If you've been thinking about not maintaining your continuing education hours and letting your CCLS designation expire, don't do it! You owe it to yourself, your employer, the legal community, and your local association to become a CCLS and to keep your CCLS going!

LS



LEGAL SECRETARIES, INCORPORATED CALIFORNIA CERTIFIED LEGAL SECRETARY WORKSHOP REGISTRATION FORM A CCLS Q&A

Third Quarterly Conference, February 21-23, 2020
Double Tree Modesto

Saturday, February 22, 2020, 7:30-8:30 a.m.

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

Is the CCLS program a mystery to you? Join us at this workshop to get your questions answered. A representative from the CCLS Certifying Board will join me in this Q&A about the CCLS Program, the CCLS Exam, and studying for the Exam. To help us ensure that we have all the answers ready, please email me your questions at cclschair@lsi.org by no later than February 14, 2020. Of course, questions from the floor are welcome.

REGISTRATION DEADLINE: February 19, 2020

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, 101 W. Broadway, Ste. 1700, San Diego, CA 92101, or by email to cclschair@lsi.org.

CCLS CREDIT WILL NOT BE GIVEN FOR THIS WORKSHOP



LEGAL SPECIALIZATION SECTIONS

February 22, 2020

Deadline to register without late fee: February 14
Section Member - Free | All others - \$15

Legal Specialization Sections Seminars

DOUBLE TREE BY HILTON
1150 NINTH STREET, MODESTO

11:00AM - 12:00PM

Probate and Estate Planning

Probate/Trust Administration Calendaring

Leslie Kalim McHugh, Esq.
Berliner Cohen LLP

Criminal and Family Law

The Anatomy of a Murder

****Warning, graphic material.****

Jeff Mangar, Chief Deputy District Attorney
Stanislaus County

3:00PM - 4:00PM

Civil Litigation

Both Sides of Calendaring

Richard D. Moths, Esq.
Arata, Swingle, Van Egmond & Heitlinger

Specialty Law

DISBARRED - The Main Reasons WHY and How to Protect Yourself

Diane M. Mecca, CP, CBA, LDA
1st Class LeGals

4:30PM - 5:30PM

Federal Law

Bankruptcy 101: E-filing Basics

Cecilia Jimenez, Team Leader
United States Bankruptcy Court, Eastern District of CA

Law Office Administration

Microsoft Office Tips and Tricks for the Legal Professional, Part 1

Outlook & Word - Solve Your Frustrations and Boost Your Efficiency

Marni Beach
Legal Support Solutions

****This seminar does not offer California MCLE credit.
CCLS credit only.**

REGISTER ONLINE AT WWW.LSI.ORG

The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1 hour each, by the State Bar of California unless otherwise specified.



The Continuing Education Council

PROUDLY PRESENTS



Lt. Ivan Valencia
Modesto Police Department

UTILIZING DRONE TECHNOLOGY TO IMPROVE PUBLIC SAFETY

A presentation on how the City of Modesto utilizes Drones for safety and other areas of the law; how the laws are changing and how the new laws will affect the Federal, State, County, and City regulations.

FRIDAY, FEBRUARY 21, 2020

5:15 p.m. to 6:15 p.m.

Modesto Double Tree
1150 9th St., Modesto, CA

Email reservations to: J. Cori Mandy, CCLS
edprogramcoordinator@lsi.org
619-515-3256 or 619-954-3603

*Seminar is free with a paid conference registration

Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1.0 hour.



LEGAL SPECIALIZATION SECTIONS

What's your specialty?

Criminal and Family Law, Federal Law, Law Office Administration, Litigation,
Probate and Estate Planning, Specialty Law



MONTHLY WEBINARS*



**QUARTERLY
NEWSLETTERS**



**QUARTERLY SEMINARS
AT CONFERENCES**

Continuing education for legal staff!

For LSI members:
\$20 - individual Sections
\$75 - all six Sections

For non-LSI members:
\$40 - individual Sections
\$150 - all six Sections

The LSS is a program of Legal Secretaries, Inc., dedicated to providing continuing legal education for legal staff. Join all six Sections now to enjoy the full benefits of being a member! Membership is from May 1 - April 30.

*LSS webinars are offered at a discount price for members of the LSS.
However, if you join all six Sections, then LSS live webinars are included for free with registration.

Visit the website for pricing & membership

www.lsi.org



DIANE MECCA, CP, CBA has been a member of Stanislaus County LPA since 1996. She is a Certified Paralegal and a Certified Bankruptcy Assistant. She is the Program Director/Instructor of the Certified Paralegal Program at Abrams College in Modesto since 2004. She is the co-owner of First Class LeGals Attorney Support Services. In her spare time, she enjoys cooking and spending time with her grandchildren, and she Marshalls PGA and USGA golf tournaments.

Get Ready to Get Your Game On!

BY DIANE MECCA, CP, CBA – SUBMITTED BY STANISLAUS COUNTY LPA

Stanislaus County Legal Professionals Association is excited to be hosting “Game Night!” at LSI’s 3rd Quarterly Conference from February 21-23, 2020 at the DoubleTree Hotel in Modesto, California.

Get ready for Game Night on Friday night! Put on your game face and be prepared to join other LSI members from your neck of the woods in competing in a game challenge. You will have to show up to see who comes out ahead and knows their stuff. Banquet will be a mystery where you will need the help of your peeps to figure out whodunit. We might or might not find clues throughout the weekend about the mystery. As we head to the End of the Game, and prepare to finish all of the fun-filled events of the weekend, we will enjoy a relaxing brunch before everyone heads home.

Located in the heart of downtown Modesto, the DoubleTree by Hilton Hotel offers you a warm welcome with a famous DoubleTree cookie and a great place to stay while exploring Modesto or attending an event at Centre Plaza. Stay busy and keep in touch in the 24-hour business center. Complimentary WiFi lets you get work done in your bright and airy California-style guest room or suite. Room rate for the conference is \$139.00 a night, and parking is 50% off in the 9th Street Parking Garage (Regular Price \$12) or \$17 for Valet Parking. The cost for the Scrip is \$145.00, as long as it is received by January 22, 2020. Soak up any possible sun as you take a swim in the outdoor (hopefully heated?) pool, open from 6AM-10PM. Keep up your exercise routine with a visit to the fully equipped 24-hour fitness center. Refuel and catch up with friends in Maxi’s restaurant.

Situated in the bustling center of Modesto, the hotel is ideally placed in the city’s business district and the Centre Plaza. Enjoy the vibrant cultural scene with a show at the iconic State Theatre or the modern Gallo Center for the Arts.



Grab a bite to eat in one of the numerous restaurants and enjoy a drink in a stylish bar. Modesto is the perfect place to explore Northern and Central California. The central location of the city gives you easy access to the breathtaking natural beauty of Yosemite National Park and various ski resorts, and puts you close to the world-famous Napa Valley wine-making region.

Stanislaus County LPA looks forward to meeting and greeting you all in Modesto in February!

LS



JOSEPH JONES is a licensed Private Investigator and the Vice President of Bosco Legal Services, Inc. Joseph is a Certified Social Media Intelligence Expert, has degrees in Social & Behavior Sciences and Psychology, and holds multiple certifications in Open Source and Cyber Intelligence. He is a court recognized expert and has received specialized training from the military, various law enforcement agencies, and the nation's top private intelligence firms, and has also provided training to the same. When he's not tracking down bad guys or helping law firms and insurance companies uncover the truth, he enjoys spending time with his beautiful wife and 4 active children.

Track Down People Like a Pro!

BY JOSEPH JONES – SUBMITTED BY SAN GABRIEL VALLEY LSA

By virtue of working in the legal field, most readers of this article will have likely had the need at one point or another, to track someone down. Whether it's a defendant, a witness, or a long-lost heir to an estate, the ability to locate an individual (aka skip trace) is a skill that every legal professional should at least have a working knowledge of.

In writing this article, the author is aware this is a service that will usually be sent by a law firm to an outside vendor; however, it behooves anyone hiring out this sort of work, to at least have a working knowledge of the latest and best techniques. This article aims at providing real life, useable information for the DIY legal professional, while still being relevant and interesting to those who will rarely do the work themselves, but want a peek behind the curtain of what PI's do.

DATABASES

Databases are great. They have absolutely revolutionized the skip tracing industry, and are a must have tool in any skip tracing toolbox. Databases will often search information from billions of public and private records and combine them into one spot. Records will typically include information from phone companies, credit bureaus, property records, utility records, along with numerous other sources. There have been many debates about which databases are the "best," but the truth is that all databases have their own sets of strengths and weaknesses. As a personal preference, the author does not believe that Westlaw or LexisNexis (both of which are very common in law firms) are among the more effective tools for skip-tracing; however, they are often better than the free resources available online, and may be necessary to use, if that is all the firm has available. In the authors opinion, tools such as Clear, Tracers, and TLO are typically much better at finding current information.

While databases are great, the most common mistake among legal professionals is the tendency to rely too much on them. It's important to recognize that computers are the ones pushing out the information, and they do not have the same ability to interpret data as a live person does. Databases can sometimes provide outdated or inaccurate information, and so it's important to try and verify the information located from a database, with as many other sources as possible, before acting on it.

PROPERTY RECORDS

Any real property bought or sold in the United States must be documented at the recorder's office in the county where the property is located. These records are usually free or low cost to view, and oftentimes can be accessed online. These records typically contain very useful information including the name of the owner, when they bought or sold the property, an indication if the property is listed as owner occupied or not, and the address where the tax bill is being sent to. This is all invaluable information to the skip tracer, especially when dealing with a subject who owns multiple properties, because often times, the address where the tax bills are being sent, is where the person actually lives.

UNITED STATES POSTAL SERVICE

Locating and/or confirming an address through the USPS is a great way to establish diligence while skip tracing, and can be extremely helpful when the person being searched for is being evasive. To do this, one needs to complete and submit a "Request for Change of Address or Boxholder Information" form to the post office that services the address in question. The post office is required to complete the form and indicate if a person is receiving mail at an address, if they are having their mail forwarded, or if they are not currently receiving mail at the address provided. This form will usually be filled out by the mail carrier who goes to that particular address on a daily basis, and as such, is usually quite accurate. In addition, that same form can be used to obtain the physical address that the post office has on file for a P.O. box holder. This form is easily found online, but beware, the post office generally does not respond to these requests timely.



SOCIAL MEDIA

In this day and age, many people put their entire lives on their internet; it's actually quite ridiculous at times, but it can be a gold mine for skip tracers. An entire article could be written on this subject alone, especially since Social Media and Cyber Investigations are the author's primary area of expertise; however, the following main points will provide some high-level guidance:

Never use personal accounts to investigate or track someone down, it opens the user up to significant risk and can be traced back to personal information. Individuals conducting these sorts of investigations should use a blank account.

Don't look only at Facebook. Yes, Facebook is still relevant, but other platforms such as Instagram, Twitter, YouTube, and Snapchat are likely to have useful information as well.

Locate and review the accounts of the subject's friends and family for relevant information.

Social media can be a black hole, so make sure that the time spent investigating on social media is not disproportionate to the total time available to work on the locate.

OSINT SEARCHING

Google is a great source of information; however, the main challenge that it presents to skip-tracers is that it gives too much information, often burying the most important pieces of information deep in the search results. Open Source Intelligence gathering (OSINT) is an industry term that basically means "Google searching on steroids." Utilizing good OSINT techniques cuts through the ads and people finder websites, and helps the user find exactly what they are looking for.

For example, if one were to search Joseph Jones Private Investigator using Google, they would receive over 26 million search results, the large majority of which would have no relevance to the subject being searched. The above referenced search is basically telling Google "tell me anywhere those 4 words appear on a page together."

Utilizing quotation marks around certain words (i.e. "Joseph Jones") tells the search engine to look for multiple words as a single term. One could also use the proximity search operator, NEAR(10), which tells the search engine to find results that link multiple terms within 10 words of each other. So instead of the first search, one could search "Joseph Jones" NEAR(10) "private investigator" and it would greatly increase the efficiency of the search. Rather than several million results, there would be only a couple thousand results, most of which will likely pertain to "Joseph Jones", who is a "private investigator", because the 2 terms were found on the same page, within 10 words of each other. There are many of these types of search operators available, and they can easily be found by searching Google for "Boolean Search Operators."

DMV RECORDS

In California, attorneys and private investigators who go through a thorough vetting process can obtain direct access to

various types of DMV records, which can be a major help when attempting to locate someone. Going through the approval process can be time consuming and is only recommended if one is going to be doing high volume searches. There is an easier (and free) way to obtain vehicle information which may help identify potential vehicles for a person. To do this search, one only needs a name, a potential address, and a date of birth for the person to be located. Running those pieces of information through most major car insurance websites "request a quote" feature, will likely return a list of possible vehicles. Of course, once the list of vehicles populates, don't follow through with actually requesting a quote. Also keep in mind that these results are not always accurate or complete, but they may help to identify which vehicles a subject may be driving, which could be the start of an asset locate or which may assist a process server in identifying if an individual is home.

OTHER IDEAS

Most individuals who need to be located in conjunction with legal proceedings will be able to be located utilizing the aforementioned tools and techniques. There are, however, a smaller percentage of individuals, who for various reasons cannot be located, and it behooves the skip-tracer to look outside the box. In this day and age, almost anyone can be located, the question usually just becomes "Is it worth it?" Additional ideas to consider for locating people could include*:

- Using license plate recognition technology to track known vehicles.
- Using financial transactions to trace frequented businesses.
- Locating/contacting friends and family.
- Tracing utility accounts (even if the bill goes to a P.O. Box, the utility company has to know what address to service).
- Contact the subject under pretense to get them to disclose their location.

*Note some of the tactics mentioned above may or may not be practical and/or legally permissible, depending on the scenario in which they are being utilized for, and the rules may vary by jurisdiction. Please consult with an attorney for any questions about the legalities in your particular situation.

CONCLUSION

Tracking down people can be fun, but it can also be time consuming. Each law firm will have its own policies on who should do locates and how much should be spent on them. Most reputable investigation agencies will charge between \$200-\$300 to do an average locate, and the more difficult ones go up from there. Some firms will be excited at the prospect of having a legal secretary or paralegal capable of doing these searches in-house, and some will prefer to outsource to those who can do them most efficiently. Either way, with this newfound knowledge about some of the more effective tips and tricks for tracking people down, the reader can now move forward from a place of power and confidence, knowing how to track people down like a pro!

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LINDON LILLY has 20 years of experience in law enforcement and another 35 years of experience in the legal support and security services industries. While working in law enforcement, Mr. Lilly spent over a decade providing specialized small arms training on the 9-millimeter Glock, the shotgun, and the Ruger Mini-14 rifle. Mr. Lilly is California POST certified in Active Shooter Training for Trainers, Active Shooter Pre-attack Behaviors, FBI Debriefing of Active Shooters, and Bombing Investigations. During his illustrious career, Mr. Lilly received numerous letters of recognition, including those from Joint Agency Task Forces and the California State Assembly. Today, Mr. Lilly is informing employers (public and private) about the risks of workplace

violence and how to mitigate those risks. Unfortunately, many employers are unaware of the new laws recently passed in many states. Mr. Lilly's article will explain those risks to employers, make known the proliferation of so-called "red flag" statutes, and train decision makers on how to use them efficiently to prevent tragedy.

Gun Violence Restraining Orders

BY LINDON LILLY OF RHINO ATTORNEY SERVICE

You hear about it way too often. A national active shooting story involving a disaffected employee shooting up his workplace. And for every national story, there are a couple lesser local instances that aren't reported nationally—that you don't hear about. But you already know the stories. Employee A, tired of being bullied by Employee B, brings his deer rifle to work one day. Then there's the employee that hates his supervisor enough to make threats. Or enraged at being fired, an employee takes revenge.

Gun violence is, if not more common than before, certainly more in the public consciousness. Governments in general (California in particular), are reacting to the public's concern. If you live in California, you must be aware of the Gun Violence Restraining Order (GVRO). It's modeled after the long-standing Domestic Violence Restraining Order (DVRO). Simply put, since 2016, if a family member fears someone close to them may use a gun to hurt themselves or others, they can ask the court to issue a GVRO (a court order prohibiting the other person from possessing a gun, ammunition, or magazines). Law enforcement officers can also request a GVRO. A judge makes the call whether to proceed. Want to know more about how GVROs work? Check out <https://www.courts.ca.gov/33961.htm?rdeLocaleAttr=en>.

People allowed to request GVROs have been limited to family members, in-laws, cohabitants, and law enforcement. Obviously, the intent is for people who have close daily contact with the aggrieved person to be able to protect themselves.

But where is there closer daily contact than the workplace? Many people spend more time at work than at home. And the workplace isn't composed of similar people linked by long-standing and familial relationships. It's composed of disparate persons and personalities experiencing the stresses of production goals, competition, and hierarchical structure. Can't the risks be equally great?



Thus, a new California law (AB 61, Oct 11, 2019) expands the terms of the GVRO to the workplace. Beginning Sept 1, 2020, employers, coworkers, and school employees can apply for GVROs. At present, law enforcement officers apply for and secure the overwhelming majority of GVROs. But by the time law enforcement becomes involved, it's often already become a crisis. The hope is that AB 61 will increase the range of persons who can identify risks earlier—before a crisis emerges—and prevent bloodshed ("What Is a GVRO?" 2019).

Corporate and business decision makers must be aware of these laws. Employees are coming to you now with concerns about coworkers...many frivolous...but many are warning signals. Burying your head in the sand, ignoring these concerns, thinking, not at my worksite, is foolish at best, negligent and liable at worst. Employers must educate themselves about these new laws in case this unthinkable, but too familiar, scenario arises. Soon you'll have the means to address risky workplace situations in a simple, open, judicial forum.

For more free information about these new laws, contact Lindon Lilly at: llilly@californiaactiveshootertraining.com

Website: www.californiaactiveshooter.com

Reference: What is a GVRO? Speak for Safety. (2019). Retrieved from <https://speakforsafety.org/>

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BROOKE MURPHY is an attorney at Madigan & Lewis, LLP, a Bay Area family law firm committed to providing strategic, responsive, and solution-oriented advocacy. Ms. Murphy focuses her practice on all aspects of family law, including dissolution of marriage, domestic violence matters, child and spousal support, property characterization and division, and high conflict custody and visitation disputes. She also helps clients seek name and gender changes by securing court orders and changing government identity documents. She can be reached at: <https://www.madiganlewis.com/brooke-murphy/>

Reflecting on Lessons Learned - From File Clerk to Practicing Attorney

BY BROOK N. MURPHY, ESQ. – SUBMITTED BY SAN MATEO LPA

I began my legal career as a 22-year-old file clerk. Over the years, I progressed from a file clerk to legal assistant, paralegal, law clerk, and now associate attorney. After working nearly a decade in the legal industry, I reflect on lessons learned at each career stage and the importance of relationship building between legal support professionals and attorneys.

Team Player. The law firm organizational hierarchy can be intricate, complex, and difficult to navigate. Equity partners, non-equity partners, associates, staff attorneys, of counsel, law clerks, paralegals, legal assistants, legal secretaries, receptionists, and file clerks each play a vital part in a law firm's structure. Each role's responsibilities make a law firm run smoothly. Regardless of the position I held, I never met a task that I was better than. By way of example, as a file clerk I sometimes answered the phones to help out reception. As a paralegal I occasionally created new client files if a legal assistant needed an extra set of hands. As an attorney, I often greet clients, escort them to the conference room, and offer them coffee and water. My philosophy is to willingly take on duties for the betterment of the firm, rather than strictly adhering to tasks listed in my job description.

Internal and External "Clients." In my view, one of the most challenging aspects for legal professionals is answering to both internal and external clients. External clients are the firm's clients. As a paralegal, I frequently had more face time and direct communication with clients than any other person at the firm. I had to represent the firm well in every email, phone call, or in-person meeting. I was the client's point person – the person they could reach by phone, schedule last minute meetings with, or keep the office open after hours so they could drop off documents. But as legal professionals we also have internal "clients." As a paralegal, I developed working relationships with attorneys and treated them like I would a client. I was expected to provide excellent customer service to my colleagues. I aimed to create a work product for my internal clients that was at the same level of a work product for an external client. Ultimately, internal customer

service advances external customer service.

Strong But Flexible. Law firms experience many shifts – staff restructuring, technology upgrades, paperless procedures, new employee handbooks, outsourcing, and changes in the law. When I was newer to the legal industry, an email from a managing partner citing new policies and procedures would send me into a panic. What does this mean? Will employees be laid off? How will this affect my team? Now, rather than feeling overwhelmed about the uncertainty, I try to keep my head down and continue working hard. Regardless of whether the new policy rolls out smoothly, hard work, determination, and a can do attitude shine during organizational shifts. I have learned to be strong and confident in my skills but flexible when change inevitably comes my way.

Ask. As a file clerk, paralegal, and now attorney, it helps me to understand my assignment by asking how it fits into the big picture. Rather than treat each assignment as standard operating procedure, I challenge myself to be curious. What is the end goal? How does my piece fit into the puzzle the attorney is putting together? Why does an attorney like their binders, notes, or files done a certain way? For me, context helps clarify my assignments.



CONTINUED ON PAGE 25

REFLECTING ON LESSONS LEARNED...

Continued From page 24

Fail Forward. The law has a way of humiliating brilliant people. As legal professionals, we have to make correct decisions quickly, even when we are rushed, tired, and juggling multiple projects. Mistakes will happen. When I was a file clerk, I would dwell on my mistakes after an attorney ridiculed me. Now, I move through my mistakes, owning my role, pivoting quickly, and failing forward. After completing a large project, hearing, or client meeting, I request a quick post-mortem with others on the team. What could we collectively have done better? What was effective and what was ineffective? What procedures and communications can we put in place to make sure a similar mistake does not happen in the future? Failure results in growth.

Join a Professional Organization. I wish I had the benefit of a professional organization when I was a legal support professional. Having colleagues and confidants outside of your organization is a beneficial way to improve skills, learn from others, develop professionally, and build community. A law firm is a stressful place. A new perspective from like-minded individuals can help prevent fatigue and burn out.

Volunteer Inside and Outside the Firm. We all know that volunteering provides valuable professional experience while also giving back to the community. I enjoy participating in pro bono events and law clinics. Legal support professionals are a great asset to these community programs. Over the past

ten years, I have realized that as legal professionals we have access to resources, people, vocabulary, and methods to seek and obtain justice that non-legal members of our community do not. Activist Cleo Wade wrote, "Always remember that being seen and heard is a luxury. To live a life of being able to say 'That's not fair' and receive respect, attention, and action is a gift most people in this world, country, and even neighborhoods down the road from you are never given." Volunteering will help refine your skills, provide a sense of purpose, determine your career goals, and is an opportunity to connect with your colleagues outside of the office. In terms of volunteering inside the firm, I recommend sticking your neck out. Volunteering to coordinate an event, work with a new attorney, or write a blog article can improve firm culture.

Be Kind. Working as a legal professional is hard, so be kind to one another. Try your best to have fun when engaging with the law, clients, and each other.

For each position held over the last ten years, I have sought to appreciate the skills and abilities of those around me in the hope that it will facilitate mutual understanding, admiration, and respect. No matter what role we are in, our relationships with one another are an important part of what makes our jobs truly rewarding.

LS

Quarterly Assignments

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

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Alameda County, Beverly Hills/Century City, Conejo Valley, Contra Costa County, Desert Palm, Fresno County, Humboldt County, Imperial County

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CCLS QUIZ:

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| 2. (a) Yosemite Valley Lithographics
(Yosemite, Valley, Lithographics)
(b) Yosemite-Merced Linoleum
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(c) Yosemite Sam (Sam, Yosemite) | 7. (a) U. S. Trucking
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(b) Peter Staggin
(c) Suzanne St. Marie | 10. (a) Howard Hanson
(b) Hanson's Hardware
(c) Howard Hanson's Hardware |

CCLS QUIZ ANSWERS ON PAGE 35



CORENE E. RODDER is a legal professional with Somach Simmons & Dunn PC. She has been working in the legal field since 2006 and is currently the governor of the Sacramento Legal Secretaries Association for 2019-2020.

What happened to Rosie?

BY CORENE RODDER – SUBMITTED BY SACRAMENTO LSA

They were shipyard workers, welders, factory laborers, secretaries, and phone operators. Four million additional workers were needed in industry and the armed forces during World War II, and women fulfilled much of this demand. Encouraged by war propaganda (especially in magazines), eight million women began working during the War. The Ladies' Home Journal Magazine pictured a woman combat pilot on one of the covers. Stories described "women secretly but bravely dabbing their eyes and forcing encouraging smiles upon their faces as their husbands and sons, their brothers and lovers march off to war." Newspapers were full of happy women doing "men's work" in factories, offices and farms. Rosie the Riveter, a sexually attractive, strong, working woman, became a heroine. But, two years after the War, almost two million women lost their jobs. Some women accepted the return to home readily. Others protested. While the country attempted to create a new and exciting future, women's roles also changed, leading to feelings of isolation and worthlessness.

While some magazines encouraged women during World War II to leave the home front to help the boys on the battlefields by working, government officials and other news sources reminded women that their first duty was to home. Nancy Brown, the Detroit New Women's Advisor, told women in 1940 that their "children were still of school age. In spite of your assertion to the contrary, they do need you. It would not be possible for you to carry on two jobs, one outside your home and one inside." Government agencies, social workers, educators and politicians all echoed the idea that working mothers do "enormous psychic harm" to their children. Working moms were told that "the first responsibility of women with young children in war, as in peace, is to give suitable care in their homes to their children."

Women generally enjoyed working, despite their difficult tasks. Now single parents, they ran households during the trying times of food, fuel and electricity rations. Moms were challenged to devote themselves to the labor force for the war effort, working overtime and evening shifts, and devote themselves to their families.

Towards the end of the War, new studies and articles began to appear, reminding women that soon they would return joyfully to homemaking. An article in a shipyard

newspaper shortly after V - E Day was entitled, "The Kitchen -- Women's Big Post-War Goal." This article assured Americans that women really wanted to "put aside the welder's torch" and return it to the men. Magazines depicted women in work uniforms and tin hats rushing home and changing into the "ruffled apron and high heels" that epitomized 1950's femininity. Everyone expected this portrayal to be accurate.

Other surveys showed that most women wanted something entirely different.

Over one-half of the women working in World War II shipyards reported that they wanted to keep their jobs after the War. Factory owners should not have been surprised that most of their female work force did not quit at the War's end. The number of women in the work force dropped from 20.3 million down to 15.9 million between 1945 and 1947. Those still working, moved out of the shipyards and into more traditionally female jobs that were also low-paying. In 1946, a woman working the night shift in a fruit and vegetable cannery made eighty-five cents an hour, while a man made one dollar an hour because of his "harder duties."



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WHAT HAPPENED TO ROSIE?

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Because they were no longer allowed to work in industrial jobs, women took advantage of the expansion of clerical and service jobs in Post-WWII America, including waitresses, hairdressers, bank clerks, receptionists, computer-card punchers and secretaries. The low birth rate of the 1930's meant that there were fewer young people now in the work forces. And the majority of the young people decided to pursue a higher education rather than work directly after high school. Older workers also began to retire. This left clerical and service jobs open for women who were not highly-skilled. The jobs did require, however, a high school education, some college and even vocational training. Sometimes, this work was part time or seasonal, making it ideal for married women as well as single women.

Television and movies also saw significant changes in what was considered feminine. Katherine Hepburn and Joan Crawford had been the 1940's models. They were smart, sassy portrayers of office workers. In the 1950's, television began to emphasize women like Lucy Ricardo from *I Love Lucy*, who wanted to get into her husband's act, but failed weekly. Her ambitions became ridiculous and silly. In comparison, happy-stay-at-home-moms such as Donna Stone on the *Donna Reed Show* were intelligent and sweet -- everything her family needed. In the movies, Marilyn Monroe emphasized the sexy woman. There was no place for the "girl Fridays" of the 1940's anymore.

Since working women were often considered unfeminine, many were concerned about the ambitions that a college education would give to women. Even when men and women graduated from the same college in the same year with the same grades (although sometimes the women's grades were better), the men got better jobs with higher salaries.

Women of the 1950's were told that if they were unhappy, it was their own fault. So, they kept their problems to themselves and often slipped into depression. One psychiatrist called it the "housewife's syndrome." Another called it the "housewife's blight."

Rosie the Riveter had now become a depressed housewife. Confused by the simultaneous messages that being a housewife was valueless and valuable, these women questioned their place in the world. They made the TV dinners, drove the kids to Cub Scouts and dressed to suit their husbands. Some women rejoiced in their roles as wives and mothers. Others longed to know that their education was of real use for something more than advancing her husband's career. Either way, the women needed a sense of community that the suburbs lacked. They felt alone in their depression, yet they felt the same isolation as most of the other women in the pretty little houses in the nice little suburbs. While the majority of the women accepted their housewife roles, they trained their daughters differently. The coming generation grew up listening to mothers who encouraged education and independence. These daughters became the feminine revolutionaries of the 1960's and 1970's -- students of the 1950's *Housewives*.

Fast-forward almost 75 years and 74.6 million American women now hold civilian jobs in our modern day work environment, making up nearly half of the United States work force.

The period of Rosie the Riveter and the influx of women into traditionally male-held sectors of the work force helped expand many people's perception of what women could and should do. Today, women no longer have to choose between career and the responsibilities of being a wife and mother. Today's generation, these modern day Rosie the Riveters, can and do, have it all.

I was in my 40s when I changed from "girl Friday" to legal secretary. I owe everything to those experienced legal secretaries that made me part of their "tribe." It is my honor to continue to pass on my knowledge to new legal professionals and pay homage to Rosie who continues to remind us "We can do it!"

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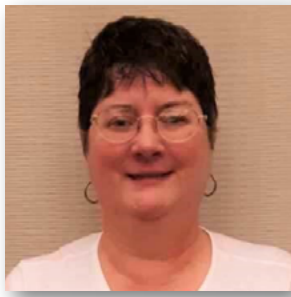
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JENNIFER L. PAGE, CCLS has been in the legal field since 1989, starting out as a legal secretary to a bankruptcy attorney. She obtained her Paralegal Certification from St. Mary's College, Orinda, CA in 1991. In 2012 Jennifer joined the firm Ragghianti Freitas LLP embarking on the next adventure in her legal 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; 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 as LSI's President from 2016-2018. She is now serving as LSI's Executive Advisor.

To Run, or Not to Run? To Participate, or Not?

BY JENNIFER L. PAGE, CCLS – SUBMITTED BY MARIN COUNTY LPA



When I joined LSI and Marin County LPA in 1991 I had absolutely no intention of being anything but a “member” of this great organization, and to network, attend educational seminars and meet new friends who had similar career goals. I attended monthly meetings, met wonderful women, learned from our speakers and really stayed in my Marin County LPA bubble. I had no real concept what LSI was other than it was the parent organization. This worked for a few years. Then I was asked to be a member of the board of my local association. I thought “why not?” And I accepted the position of Vice President. As the years went on I held various chairmanships and have been President several times. At first I was terrified of holding such important positions. I pictured myself the “worker bee” and never the leader. Why would anyone want to pay attention to what I had to say, accept my ideas, and have confidence in my ability to lead our group?

In May 1993, I attended my first LSI Conference. It was an Annual Conference in Oakland, California and Cheryl Woodson, CCLS, was the current and incoming President of LSI. I was overwhelmed and so excited at the same time. I attended workshops, luncheons and General Assembly of the Board of Governors. I was completely bowled over – I found myself among an incredible group of legal professionals. The educational workshops were top notch, luncheons informative, and the opportunity to network with legal professionals from all over the state of California was incredible. I was officially hooked.

I served my association as Governor and learned to let my voice be heard; not only did I get over the fear of addressing a room full of people, but I represented my local association which meant asking questions, expressing an opinion, getting more information on something that wasn't quite clear to me or my members. I found that I could no longer just sit among the crowd and observe, I was now participating.

Over the years I have grown to love being a participant. I may not always have the best ideas or ask the right questions, but, I have learned that it's okay for my voice to be heard, to express opinions and question something that doesn't make sense. I have been lucky enough to moderate the Newcomers

Workshop and Luncheon several times and have thoroughly enjoyed sharing the world of LSI with others.

In 1999 I was first asked to be an LSI chairman. Again, another opportunity to grow, learn and participate. Since then, I have been honored to hold various positions in LSI. Each assignment has brought a new set of challenges, but, I still considered myself a “worker bee” and not a leader.

On May 10, 2008, I was honored and humbled to receive the President's Award presented by Lorraine M. Bettencourt, PLS, CCLS, LSI Past President 2006-2008. Receiving this award validated all the hard work and effort I put forth for LSI. The award sits on my desk at work and is a constant reminder that my dedication to LSI and my local association is worth the effort.

I was happy to serve LSI as a chairman and had no intention of climbing any further up the ladder. However, a few LSI members came up to me and posed that terrifying question: “Why don't you run for LSI Treasurer?” Followed by, “you'd be a terrific officer for LSI.” Never mind that I had no bookkeeping experience and had no interest in doing so. At the time my daughter was quite young, I was studying

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TO RUN, OR NOT TO RUN?

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for the CCLS exam, I had a husband, extended family, etc. I pushed those questions aside and was determined to continue being a “worker bee” until I started to really think about my contributions to LSI and the membership. I have enjoyed working with others for the betterment of LSI and legal professionals that attend the conferences, our fellow members and those who seek out LSI for networking and education. I decided to go for it! And, in May 2016, I had the honor and privilege of being installed as President of LSI. I was saddened when my term came to an end in May 2018, but, I wouldn’t change one minute of my time dedicated to LSI.

If you are thinking about tackling this journey, I would encourage you to do so. Every single member of LSI has a voice, ideas, and something to share. If LSI is to continue into the future, it needs strong individuals to keep it moving forward. I have met many of you over the years and I do believe there are many of you who could take on this journey and make significant contributions to LSI and its membership. Yes, we all have our own lives, families, friends, work outside of LSI but I would ask you these questions: “Why did you decide to join LSI?” “What do you expect to receive as a benefit of being a member?” “Do you have ideas

that would help LSI continue on into the future?” “Do you enjoy being part of a successful team?” If you answered yes to more than one of these questions, you may well have what it takes to be a chairman and maybe even a leader.

When I began this journey, I had no idea what an incredible experience this would be and who I would become along the way. I have found a new level of confidence in myself that has spilled over into my day-to-day life both personally and professionally.

Do I still get a bit spooked addressing a crowd? You bet! Do my palms still sweat, my legs go weak? You bet! Does my heart race just before I open my mouth? You bet! If these things didn’t happen, I would think something is wrong. No one wants to fail or be criticized. But, failure and criticism help make you stronger.

I would encourage each and every one of you to consider serving LSI in some capacity. Contact the incoming President and ask to be a chairman or committee member. Take that first step, take a deep breathe and PARTICIPATE!

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Law Firms are Relying More on Staff—and Treating Them More Like Lawyers

BY DAN PACKEL - SUBMITTED BY SAN DIEGO LSA

Professional staff are gaining responsibilities and returning value to their firms, and firms are responding by extending benefits once reserved for attorneys.

It wasn't long ago that attorneys could sit down to sumptuous lunches inside their firms' private dining rooms. There, staffers—the paralegals, secretaries and other worker bees crucial to the smooth running of a firm's operations—were nowhere to be seen.

Nowadays, lawyers and professional staff—whose roles have transformed dramatically over the past two decades—find themselves brushing shoulders midday in firms' open-access cafeterias. "I don't know a firm that has a lawyer-only dining room anymore," says Winston & Strawn chief talent officer Sue Manch.

That's just one telling example of how traditional distinctions between lawyers and staff have collapsed in recent years, as firms have begun to rely on the latter more heavily, from management roles to technology and even litigation support.

"Law firms, and my firm in particular, see professional staff as integral to the entire system of our law practice," explains Hy Pomerance, the newly minted Chief Technology Officer (CTO) at Cleary Gottlieb Steen & Hamilton.

Both Pomerance and Manch are the first to hold the CTO role at their firms. The proliferation of these titles demonstrates the increased attention being paid not just to the associate experience, but also to the staff experience. Historically, the latter has been an afterthought, creating what Dechert CTO Alison Bernard—who's also the first to hold her seat—has called an "upstairs-downstairs culture."

That's a fundamental issue for any professional services firm with fee earners and non-fee earners, according to Manch. "These firms are designed to run around fee earners: recruiting them, making them happy and able to work with clients. It's our business model," she says. "You can live without a particular staff area for some time, but you can't live without a practice leader or a person who's handling a giant case for a firm."



While that dynamic has not disappeared, it's being altered by changes in how law firms operate. Lawyers leading firms are increasingly turning to professionals in C-Suite roles to make strategic decisions, not just execute on plans made by others. Further down the pyramid, legal administrative assistants have shifted focus from dictation and typing to partnering with attorneys in areas like billing, communications and client management. They're handling more litigation support tasks traditionally handled by starting associates, like trial preparation and e-discovery.

"They've gone from 100 percent clerical to a much more strategic role," Manch says. "They add value by making sure the client experience is high-value."

On the IT side, professionals have been in the driver's seat, identifying innovations for using data more efficiently that partners have likely not even contemplated.

"We're not expecting attorneys to figure out what is the best way to do things when you have people who have made a science of process efficiency and process management," Manch adds.

With staff members taking a more substantive role in firms' operations, it only makes sense to treat them more like attorneys. That includes both phasing out restricted zones like lawyers-only dining rooms and also making perks and programs more inclusive.

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LAW FIRMS ARE RELYING MORE ON STAFF...

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“The movement at Cleary has been toward a blurring of the lines between the legal side of the house and the professional side of the house when it comes to professional development and benefits at the firm,” Pomerance says.

Cleary is investing in two separate tracks of professional development for staffers. One, the technical track, allows staffers to upgrade skills in areas including technology, project management, finance and human resources, so that they can advance in their careers. Employees are supported in their efforts to go outside the firm and gain advanced degrees or certifications to fuel their forward motion. The other, the management track, recognizes that professional staff are being asked to manage at more senior levels than in the past, as senior lawyers devote more attention to practicing law.

Winston & Strawn has similarly collapsed some distinctions in professional development between staff and lawyers. Its new staff curriculum shares the same three core competencies that are also a priority for the firm’s lawyers, even if the performance factors evaluated by the firm differ. And for the first time, senior leadership on the professional staff side is taking part in an intensive management conference focused on skill development.

“To stay competitive for the best people, we have to offer a deep and comprehensive curriculum so that people can get better at what they do and also add qualifications to move to the next level,” Manch says.

The walls are crumbling in other areas, too. It used to be that firmwide events welcoming summer associates were for lawyers only; now, those doors have been opened to staff. At many firms, affinity groups aimed at improving the experience of diverse attorneys were initially conceived for lawyers. Last fall, Reed Smith announced it was relabeling its version as “business inclusion groups” and opening them to all employees. When Dechert in October revamped its parental leave policy, doing away with the distinction between primary and secondary caregivers, it applied the change to

staffers as well as associates. And as mandatory arbitration agreements are increasingly proving toxic to incoming associates, Kirkland & Ellis and Sidley Austin have garnered headlines for putting an end to the practice for staff as well.

Staffers are also being included as firms take steps to combat what some are calling a mental health crisis in the industry. As part of its 2019 “year of mental health,” Winston & Strawn is holding monthly activities for both lawyers and staff addressing topics like stress management, healthy eating and coping with the challenges that come from working in a high-pressure environment. It has trained more than 20 key staff leaders in mental health first aid. Cleary has embraced the Sibly mental health app for its attorneys and staff and brings in nutrition counselors and health care providers.

“We want to help keep physical and mental health on people’s radar. It’s a real important part of running a successful firm,” Pomerance says. “There’s a correlation between a healthy workforce and a productive workforce.”

Jamy Sullivan, executive director of staffing firm Robert Half Legal, has observed a slew of other perks, both in law firms and corporate legal departments: on-site amenities like fitness facilities and child care, greater telecommuting and compressed work weeks that allow for four 10-hour days, and paid leave for volunteer activities. And firms are likely just scratching the surface. With staffers becoming more crucial to firms’ operations, competition for top performers will intensify.

“You’re going to see organizations be forward-thinking and thought-provoking, not only to attract talent but also to keep talent,” she says.

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FROM QUIZ ON PAGE 27

CCLS QUIZ ANSWER KEY

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| 1. (a), (c), (b) | 6. (a), (b), (c) |
| 2. (c), (a), (b) | 7. (a), (c), (b) |
| 3. (b), (a), (c) | 8. (a), (c), (b) |
| 4. (c), (a), (b) | 9. (b), (c), (a) |
| 5. (b), (a), (c) | 10. (a), (b), (c) |



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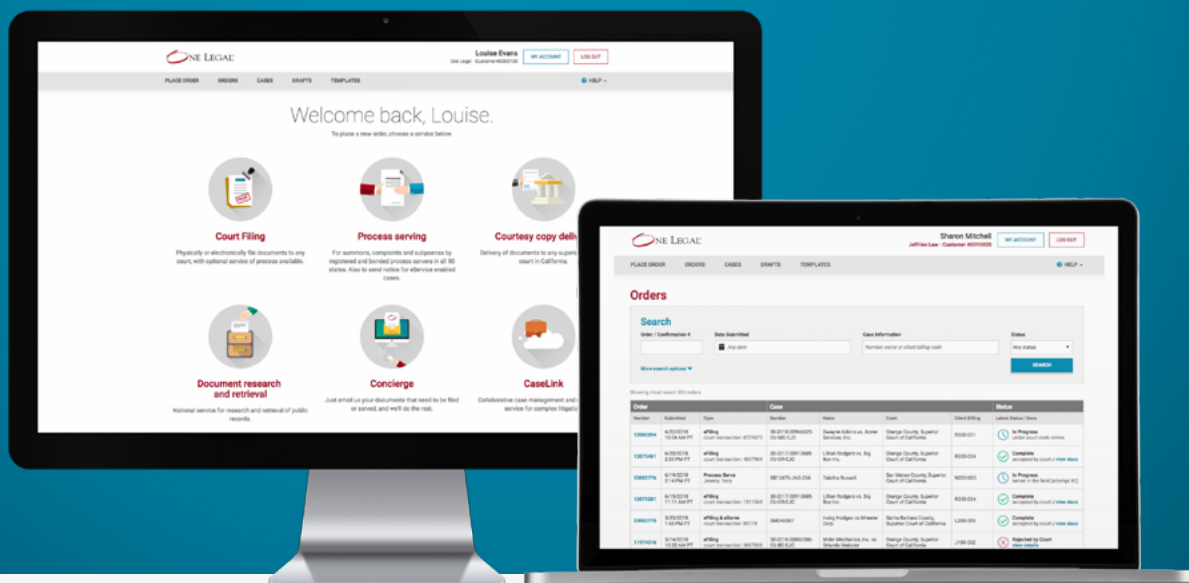
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