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VOL. 63, BOOK 4

LEGAL SECRETARIES, INCORPORATED

MAY 2009



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Long Beach, California



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VOL. 63, BOOK 4

LEGAL SECRETARIES, INCORPORATED

MAY 2009

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THE LEGAL SECRETARY, published quarterly by Legal Secretaries, Incorporated, is a benefit of membership. Subscriptions for members are included in annual dues. Subscriptions are available to non-members, at a cost of \$25 per year (4 quarterly issues), through LSI Corporate Office, P.O. Box 660, Fortuna, California 95540-0660. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered and is made available with the understanding that the publisher is not engaged in rendering legal or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought. The opinions expressed by the individual authors are their own and are not necessarily those of Legal Secretaries, Incorporated.

Editor: DEBORAH RICKERT, CCLS Printed by: MONARCH LITHO, INC.

# Building Membership Through Education

LSI President



*Christa Davis is President of Legal Secretaries, Incorporated and a member of Livermore-Amador Valley Legal Professionals Association. Christa started her legal career as a legal secretarial trainee in 1987. She has been working for Staley Jobson, a family law firm in Pleasanton since 1989, where she is currently the Administrator. Christa lives in Castro Valley with her husband and daughter.*

What a year it has been for Legal Secretaries, Incorporated; and as we begin our new fiscal year, we have much to look forward to. May 1, 2009 marks the beginning of our 75th year! Congratulations to every member of LSI past and present for believing in an idea brought forth by one person and carried forward to the organization we know today. As quoted by an LSI member in 1934: "One girl dreamed of us, and because of her dream a whole state would soon be cognizant of our existence." I am sure that Eula Mae Jett, LSI's founder would be so proud of what LSI has become. What began as the California Federation of Legal Secretaries by a few legal secretaries, has blossomed into a statewide corporation providing quality education to California's legal professionals.

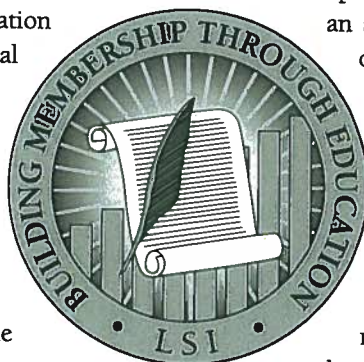
I've reviewed many scrapbooks of years gone by and I realized that this corporation has been a close knit group from the beginning. Over the past quarter we have experienced some sad turn of events within our organization. In reflecting back over these past few months, I realized how close knit this organization really is. When tragedy strikes a member of LSI in one way or another, members send cards and e-mails, and telephone those affected expressing their concern and offering support. It is wonderful to know that so many are willing to reach out and help each other.

The members of Legal Secretaries, Incorporated pride themselves on Excellence through Education; Moving Forward; and Building Membership through Associations – each focusing on the goal of increasing membership, providing quality continuing education, and striving for professional and personal growth. We've stood

strong for 75 years on that foundation; but another underlying foundation is the care factor. We really do care about the well-being of our fellow members. It is apparent when we attend conference - when we see friends that we haven't seen since the last conference – greeting them with a hug and a smile. We look forward to catching up and spending the weekend together. Everyone wants to be a part of something; whether that is an organization such as LSI, or some other vehicle that allows for human interaction. To have the opportunity to be a part of something that provides personal and professional growth is

an additional bonus. There are many organizations with similar goals, but I wonder if they encounter the closeness and camaraderie that the members of LSI experience? Never in my lifetime have I experienced such a feeling of respect, togetherness and being a part of something as I do being a member of LSI. I hope every member of LSI feels this way.

Many exciting things have transpired this past year. The statewide CCLS Study Group was conceived and is winding down to the last weeks, preparing the students for the March exam. The website has expanded with the addition of archives of *The Legal Secretary*, providing more in-depth information about local association events, and the opportunity to join online as a Member-at-Large. The marketing committee is working diligently to educate the legal community, exhibiting at the annual conference of the California Alliance for Paralegals, the Bay Area Legal Secretaries Forum Changes in the Law and Annual Workshops, and the State Bar of California Convention. Recently, the marketing committee placed an ad with the *Courtroom Resource*





Guide published through *The California Lawyer* magazine hoping to reach a broader audience. At the February Quarterly Conference, the Board of Governors voted to purchase a Light Tape animated sign designed to be a backdrop for the marketing table when LSI exhibits at legal events. These are just a few of the steps being taken to provide more exposure for LSI.

For the first time, legal professionals have the opportunity to join LSI as a Member-at-Large, through our website: [www.lsi.org](http://www.lsi.org). We have received an overwhelming response and we now welcome over 40 Members-at-Large. Some associations have voiced their concern that allowing legal professionals to join online as a Member-at-Large takes away from the opportunity for associations to bring in new members. This is a legitimate concern, and the Executive Committee has done everything possible to ensure that all potential Members-at-Large are introduced to the local associations in their area and are encouraged to join those associations.

Be sure to check your roster and the list of Members-at-Large updated quarterly, provided by LSI Vice-President Brooke Atherton, CCLS, for Members-at-Large in your area. I urge you to contact and invite them to attend an association event. Exposing Members-at-Large to the benefits of local associations may be all it takes to bring them in to your association. However, it is important to embrace those that choose to join LSI as a Member-at-Large. Camaraderie is an important aspect of any organization and opening your "association door" to Members-at-Large is a great way to share that camaraderie.

The fiscal year for Legal Specialization Sections is August through July, and membership renewals are just around the corner. Please be sure to renew your membership soon. If you are not a member of one or all of the Legal Specialization Sections, you are missing a wonderful opportunity for quality education at an outrageously minimal cost. The Legal Specialization Section Leaders never fail to amaze me with the creative topics

for their workshops. In February, attendees at the Criminal Law Section workshop were treated to an exhibition of the Law Enforcement K-9 unit for the City of Concord, and attendees were able to see firsthand what happens when police dogs are given the command to seek out contraband. This is not something you see every day!

The Legal Specialization Sections will not be offering a Fall or Spring Regional Workshop this fiscal year. At one point in time, the Regional Workshops provided an excellent opportunity to meet the educational needs for those that were

not always able to attend the workshops presented at conference. Times change as do the needs of our members, and we hope that this change will draw more attention to the Legal Specialization Section workshops presented at the quarterly and annual conferences. As always the Legal Specialization Section Leaders and the Executive Committee welcome ideas for future workshops, so please feel free to provide your comments and ideas.

In addition to the workshops offered through the Legal Specialization Sections this past year, LSI offered workshops on the Golda J. Cooper Chapter Achievement

Contest; California Legislative & Regulatory Research; Putting on Seminars/Workshops – from Topics to Presentation; Creating a History Book or Scrapbook without Spending a Fortune; Participating in the Eula Mae Jett Scholarship Program; and CCLS – Teaching the Teachers. The officers and chairmen of LSI strive to provide as much continuing education as possible and will continue to do so throughout the next year.

I hope you stepped outside of your comfort zone a bit and seized the opportunity to attend conference, educational workshops, rekindle old friendships, and make new friends. This is an exciting time for LSI. Choose to be a part of this excitement. We can build membership through education – it just takes teamwork. Thank you for choosing to be a part of Legal Secretaries, Incorporated; I look forward to another great year of education, networking, and fun. □



# Have You Hugged Your Treasurer Today?

Submitted by  
LSI Corporate Office



*Catherine Culver, CCLS, is the LSI Administrator. She received her BA in economics from Denison University in Granville, Ohio, her paralegal certificate from UCLA Extension, and earned her CCLS in 2003. She resides in Fortuna, California, with her husband, Scott Downie, and their black Labrador Retriever, Sydney.*

**T**reasurers are the unsung heroines/heroes of LSI's 41 local associations. These hard workers submit per capita dues to the LSI Treasurer and provide the corporate office with members' names, mailing addresses, and email addresses. This is in addition to all the accounting, bill paying, and checkbook balancing they perform for their associations. Their interface with the corporate office sounds simple but you would be surprised how many members change jobs, move residences, and change email addresses. Many local associations provide forms in their monthly bulletins to help members remember to send changes/corrections to the treasurer and to the corporate office. If your association does provide such a form, please use it if your contact information changes.

One of the benefits of LSI membership is *The Legal Secretary* magazine which is published quarterly. I do my best to make sure that your mailing address is correct so that you receive your magazine timely. But you have a responsibility to inform your treasurer WHERE

you want your magazine sent. Do you want to receive it at home, or at your office? Does your treasurer know this? When I submit mailing lists to the magazine publisher, I use the mailing address submitted by your treasurer.

That person may list your home address when you want to receive the magazine at your office, or vice versa. So be sure to let your treasurer know where you want your magazine sent. It is membership renewal time as you read this, or

just past it, so now is the time to make sure your treasurer has the correct mailing address for you. If you are not receiving your magazine, how did you get this copy? Just kidding. Please let the corporate office know that you are not receiving it. I will verify your address, make sure that you are on the mailing list, and mail you a copy of the magazine you did not receive.

I am working to reduce the amount of information collected on each LSI member. LSI's member database includes only your name and magazine mailing address at present.

Why does the corporate office want your email address, or a contact telephone number? Because when you request or purchase items from the corporate office, if there is a question, I need a way to contact you for a quick answer. If you choose to order an item through the lsi.org website, your email address is on the order. But if you mail in a request/order, and do not include contact information, my only option is to mail you the question. A bit awkward, no?

California Certified Legal Secretaries: Your CCLS designation is important. It should appear on

the magazine mailing label, and any other label used. If your designation is missing, please bring it to my attention. You worked hard for it; I would like to insure it appears as appropriate.

This applies to all of you Professional Legal Secretaries (PLS) as well.

Remember, the LSI Corporate Office is only a toll-free phone call (800-281-2188), or an email (lsiorg@suddenlinkmail.com) away. □



**LEGAL SPECIALIZATION SECTION WORKSHOPS**  
**Annual Conference – May 2009 – Long Beach Hilton Hotel, Long Beach CA – Host: Long Beach LSA**

**REGISTRATION FORM - DEADLINE IS MONDAY, May 11, 2009**

Registration **MUST** be **RECEIVED** by each Section Leader on or before the deadline.

Please make advance reservations so materials may be prepared. **PLEASE CHECK APPROPRIATE BOXES BELOW.**

Mail or Fax a copy of this form to each corresponding Section Leader.

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

**PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"**



**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, May 15, 2009 -- 1:30 p.m. to 3:30 p.m.**

**PROBATE & ESTATE PLANNING:**

Topic: **"Small Estate Administration"**

Speaker: Alan D. Davis, Esq.

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Leslie Ames, CCLS, Probate/Estate Planning Section Leader  
 1500 – 4<sup>th</sup> St., Eureka, CA 95501  
 (O) 707-442-0500 FAX: 707-443-2973

**LAW OFFICE ADMINISTRATION:**

Topic: **"Bermuda Triangle – Leaves of Absence"**

Speaker: Joanna L. Blake, Esq.

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Jan Vornkahl, LOA Section Leader  
 3553 Sutton Loop, Fremont, CA 94536  
 (H) 510-790-8337 (O) 415-984-8341 FAX: 415-226-0735

**Friday, May 15, 2009 — 4:00 p.m. to 6:00 p.m.**

**CRIMINAL LAW:** Topic: **"The Media Circus – Representing Clients Who Become Reluctant Celebrities"**

Speaker: Karen R. Smith, Professor of Law.

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Cheryl Kent, PLS/CCLS, Criminal Law Section Leader  
 5534 Blackbird Drive, Pleasanton, CA 94566  
 (H) 925-462-3440 (O) 925-837-0585 FAX: 925-838-5985

**FAMILY LAW:** Topic: **"When Mom or Dad are Deployed"**

Speakers: Kathleen Somerville, Esq. - Navy JAG Office, San Diego

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Stephanie Harrison, Family Law Section Leader  
 c/o Law Offices of Marvin J. Brown  
 720 West 19<sup>th</sup> St., Merced, CA 95340  
 (H) 209-723-4479 (O) 209-384-0123 FAX: 209-384-1661

**Saturday, May 16, 2009 — 4:00 p.m. to 6:00 p.m.**

**TRANSACTIONAL LAW:** Topic: **"The Legal and Ethical Pitfalls for Attorneys Engaged in Loan Modifications"**

Speaker: Scott Drexel, State Bar Chief Prosecutor

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Mae Brooks, CCLS, Transactional Law Section Leader  
 1050 S. Kimball Road, Ventura, CA 93004  
 (H) 805-642-6478 (O) 805-659-6800 FAX: 805-659-6818

**CIVIL LITIGATION:** Topic: **"Service of Process & Skip Tracing"**

Speaker: Gary Hansen – Hansen's Guaranteed Process Service

☐ I will attend   ☐ Section Member   ☐ Non-Section Member  
☐ Non-LSI Member   ☐ Handout Only

**Send to:** Elizabeth Adame, CCLS, Civil Litigation Section Leader  
 P.O. Box 4344, El Centro, CA 92244  
 (H) 760-352-8333 (O) 760-352-4001 FAX: 760-352-5561

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*The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these workshops have been approved for minimum MCLE/CLE credit of 1.50 hours each, by the State Bar of California.*



# Elder Abuse

Submitted by  
**Livermore-Amador  
Valley LPA**



*Leslie Baxter is a partner at Radick O'Dea & Tooliatos and has repeatedly been named one of Northern California's "Super Lawyers" in the areas of business law and Real Estate litigation. Leslie's litigation practice spans a wide range of business and real estate issues. She also assists commercial clients and developers with land development, permitting, and environmental issues. Leslie has expertise in handling appeals in both Federal and State courts, including oral argument before the State Court of Appeal and the Federal Ninth Circuit Court of Appeal.*

**B**ecause of our aging population, elder abuse is a growing problem. A Contra Costa Grand Jury found that nearly a quarter of a million Californians are victims of elder and dependent abuse every year. Estimates have been made that 4 to 5% of seniors suffer one or more episodes of abuse each year, but only 1 out of 15 cases is reported. These victims are 3.1 times more likely to have their lives shortened than those who are not abused, neglected or exploited. Elder abuse statutes protect seniors age 65 and older, and adults of any age who are dependent. Reports indicate that women over the age of 75, who have mental or physical impairments that cause them to depend on others for care, are at greatest risk of abuse.

Elder abuse can be an insidious problem. Sometimes the elder is reluctant or afraid to report abuse, due to shame that a family member may be involved in the abuse or due to fears that he or she will be placed in a nursing home. Nursing home residents may not have the resources to report abuse, and may fear retaliation by staff. Elders who trust others to manage finances may not realize that financial abuse is taking place. Abusive caregivers can isolate the elder, making intervention difficult. Problems are often exacerbated by the elder's diminished mental or physical abilities.

Elder abuse takes many forms: neglect (by self or others), physical and sexual abuse, emotional abuse and financial abuse. Abuse can take the form of deprivation of care, abandonment, isolation or abduction. The perpetrators can be almost anyone, including family members, friends and acquaintances, advisors and caregivers, both in and outside of the home.

## Resources

Counties have Adult Protective Services departments which investigate reports of elder abuse and work with the elder and his/her trusted friends and family, to plan for the creation of a safe living environment for the elder. If you are the victim of abuse or suspect elder abuse, in Contra Costa County, call APS at (877) 839-4347. In Alameda, call APS at (866) 225-5277. Both numbers are toll free 24 hour hotlines. For a list of APS departments for all California Counties, go to [www.dss.cahwnet.gov/pdf/apscolist.pdf](http://www.dss.cahwnet.gov/pdf/apscolist.pdf). Certain classes of people, such as care custodians, medical professionals, clergy and law enforcement officers, are mandatory reporters who must report to APS when it reasonably appears that elder abuse is occurring. If the elder is in immediate physical danger, a call to 911 may be appropriate, and responders may have the obligation to contact APS within certain timelines. When in doubt, a concerned person should make the call to APS themselves.

APS social workers may take steps to correct situations involving abuse, but budget cutbacks on government services may limit the amount of assistance that APS can provide. Our experience at Randick O'Dea & Tooliatos is that APS is very busy with the most egregious cases, and cannot provide assistance in all areas, for instance, in recovering appropriated property or initiating conservancy proceedings. Similarly, the district attorney's office may opt to investigate and prosecute the worst cases of abuse, leaving others to be resolved privately, through the civil courts. The civil statutes regarding elder abuse, however, are quite strong. Persons 75 and older are entitled to priority in trial setting, so elder abuse trials

*(Continued on page 13)*



# Diamonds on the Shore

2009 Annual Conference  
Chairman

**L**ong Beach Legal Secretaries Association is delighted to host the 75th Annual Conference for Legal Secretaries, Incorporated, at The Hilton Long Beach from May 14-17, 2009. Please join us and be treated like a precious gemstone.

Long Beach has some great attractions to see. The Pike at Rainbow has a variety of rest venues, Ferris wheel and open-air marketplace. The Pike is one of the most unique waterfront locations on the West Coast.

Why not take a journey on the free Passport shuttle in downtown for a quick ride to all must-see Long Beach attractions. The Pine Avenue Link route, serving Pine Avenue, Shoreline Drive, Pine Avenue Circle, and the Aquarium has been combined with the Passport C route serving the Queen Mary. For only 90 cents, the Passport A will take you on a voyage along our coast to the Long Beach Museum of Art, Belmont Shore and Alamitos Bay Landing.

The Hilton Long Beach Executive Meeting Center is located at the World Trade Center, 701 West Ocean Boulevard in Long Beach in the heart of the business district. It is central to the Convention Center, Long Beach Aquarium of the Pacific, Port of Long Beach and Southern California's best beaches. The Hilton is conveniently located near three airports: Long Beach Airport (LGB) is the closest airport and Jet Blue has flights to Long Beach from Sacramento, Oakland, San Francisco and San Jose. Los Angeles International (LAX) and John Wayne/Orange County Airport (SNA) are less than 21 miles to Long Beach.

Check-in time is at 3 p.m. Requests for early check-in will be handled based on hotel availability at the time of check-in. The hotel provides complimentary baggage storage. All guest rooms

feature wireless internet service, ergonomic desk chairs, and coffee makers. In addition to complimentary 24-hour access to the newly renovated 6000 square foot fitness center, there is also an outdoor pool and spa. All guest rooms are non-smoking.

Hotel guest parking rates are \$15/day for self-parking and \$17/day for valet. For those coming just for the day, parking is \$9/day. You might be able to find some free parking on Saturday and Sunday in back of the hotel.

There are two restaurants serving the Hilton. The Ascari Ristorante is open for breakfast, serving both continental and full breakfast buffets as well as a la carte menu items. The Daily Grill Restaurant, adjacent to the hotel, is a full service dining facility offering lunch and dinner and has a full bar. The Daily Grill also operates room service within the hotel. There are several eateries within walking distance.

Reservations can be made by calling the Hilton directly at 562-983-3400 or online at <http://www.longbeach.hilton.com>. The Group Code is LEG. The deadline for the group code is April 24.

The scrip ticket price is \$110 if purchased before April 15, 2009. Thereafter, the scrip will be \$120. Scrip tickets include registration, reception, banquet and brunch. The room rate is \$169/night for single and double occupancy, \$194/night for triple and \$219/night for quad (maximum four guests per room).

Members of LBLSA will be wearing diamond or jewel shaped stamps on their name badges. Don't forget to find one of us to purchase your tickets for opportunity drawings!

Educational workshops will be held on Friday and Saturday afternoon. History books will be on display on Friday and Saturday. The Governors'



*Debby Tankersley, CCLS is the Conference Chair for the 2009 Annual Conference (although she couldn't have done it without Cheryl, Cathleen, Alice and Andree). She has been a Legal Secretary since 1979 and has been a member of Long Beach LSA since 1991. Debby works at Jackson DeMarco Tidus Peckenpaugh in Irvine, CA as a Land Use/Litigation Secretary. She has been married to Rick for 30 years and has a son Everett and a daughter Megan.*

*(Continued on page 8)*

*Diamonds on the Shore (Continued from page 7)*

Luncheon is open to Governors only and the Newcomers' lunch will be held on Friday. The CCLS Luncheon (open to all members) will be held on Saturday to honor those who have achieved certification during the 2008-2009 fiscal year. Please visit all the wonderful exhibitors on Friday from 8:00 a.m. to 8:00 p.m. and on Saturday from 8:00 a.m. to 3:00 p.m. They will be showcased in the Promenade.

We have lined up some very enjoyable entertainment for you during the Friday Night Welcome Reception, so if you like the Beatles and Frank Sinatra, you will enjoy the entertainment! The dress attire for the reception is business casual.

The General Assembly will commence on Saturday and conclude on Sunday morning.

The dress attire for the Saturday Night Banquet is dressy casual.

Chapter Achievement contest winners and the LSI President's Special Presentation will be announced. The LSI Installation of Officers will be held on Sunday at Brunch.

Please feel free to contact me if you have any questions or require more information. My direct line at work is 949-851-7473 or you may email me at [dtankersley@jdtplaw.com](mailto:dtankersley@jdtplaw.com). □

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NATIONWIDE COURT REPORTERS



# LSI Third Quarterly Conference 2009





# Assisting Your Attorney In Limiting The Costs Of Arbitration

Submitted by  
Alameda County LSA



*Cindy Cravalho, an ADR Specialist, has been with JAMS for 8 years. In addition to case management Cindy is a member of JAMS' General Inquiry and Arbitration General Demand Teams. Prior to coming to JAMS Cindy worked for various law firms in the North Bay as Records Manager, Legal Assistant, and Office Manager.*



*Ellen Schuster is an ADR Specialist at JAMS, administering numerous arbitrations and arbitration programs, working closely with clients to select their mediator or arbitrator and guiding clients through the selection and case-setting process. She graduated with a J.D. from University of California, Davis School of Law.*

Paralegals, legal assistants, and secretaries are invaluable in preparing attorneys' cases for arbitration, especially when it comes to regulating the costs associated with a matter in arbitration. Whether in selecting the arbitrator, researching and preparing the arbitration demand or briefs, conducting discovery, and preparing witnesses for the arbitration hearing, legal assistants can and should pay attention to the costs involved both for your attorney and your clients. This article gives you a basic understanding of arbitration and some of the constructive ways you can keep costs down throughout an arbitration.

Alternative Dispute Resolution (ADR) is a range of options available to feuding parties who desire an alternative to direct negotiation or litigation, as well as a faster, more efficient way of resolving disputes than the courts. ADR processes can be considered either facilitative or adjudicative.

In a facilitative process, a neutral third person assists parties in negotiating a settlement. The role of the neutral is to find areas of consensus to bring the parties together and to find bridges or solutions to the areas of disagreement. The neutral does not have power to impose a solution or decision, so the parties have control over the outcome of the case.

In adjudicative processes, a neutral decision-maker hears and considers facts and arguments, typically in order to render a binding decision or solution based upon an agreed-upon standard of legality or fairness. While the neutral's role is to issue a solution for the parties, he/she does so within the scope and parameters of either the stipulation or arbitration clause granting authority to the neutral; but parties do have less control over the outcome.

Arbitration, the most traditional form of private dispute resolution, is an adjudicative process wherein the arbitrator, typically a retired judge or attorney, renders a final, binding decision at the

conclusion of an arbitration hearing, subject only to a very limited court review.

Arbitrations are often administered by a private organization that maintains lists of available arbitrators and provides rules under which the arbitration will be conducted. Such organizations can also manage the arbitration process generally.

We will briefly outline the differences between trial and arbitration, discuss the cost-saving benefits of arbitration, and detail the ways costs may be reduced during the arbitration itself.

## Arbitration vs. Trial

Arbitration differs from- and is very often more desirable than- trial for several reasons:

1. **Governing Rules:** At trial, parties are governed by strict local, state, and federal rules regarding everything from conducting discovery to putting on evidence. In contrast, arbitration allows the parties to design their own process and select their own rules.
2. **Selection of Decision-Maker:** In the court system, the parties' judge is determined by the court clerk. Arbitrators, or the method for their selection, are mutually agreed-upon.
3. **Level of Formality:** Formality is at its zenith at trial, where order and traditional decorum must be maintained at all times. The level of formality is significantly lower during the hearing, where the parties are typically in a conference room, quite often sitting around a meeting table.
4. **Determination of the Case:** At trial, a decision will not be rendered until the formal case is concluded and there is the potential for a lengthy appeals process. In arbitration,

with a few exceptions, the arbitrator's decision is final and binding, but the parties can get resolution on many issues prior to the end of the hearing. Because arbitrators can render interim awards on the merits of the case, many substantive issues can be resolved quickly and before the matter is finalized.

**5. Efficiency and Predictability of Costs:** The most compelling advantage of arbitration is its efficiency and predictability with regard to costs. Because the process is controlled by the parties and a limited set of rules, the length and timing of the proceedings is typically significantly shorter than a court trial. Many costs can be predicted with a high degree of certainty: the arbitrator's fees and any related administrative fees can be evaluated up front and the time needed to prepare and conduct discovery is often much shorter than at trial. Be aware that some provider organizations will adjust their administrative fees during the course of proceedings if the amount in controversy changes during the life of case; this may be one reason to avoid organizations without predictable costs.

You can assist your attorney by taking advantage of arbitration's cost-effective benefits both in designing the process and during the course of the arbitration proceeding.

## Designing the Process

### Types of Arbitrations

You can assist your attorney to select the best and most efficient type of arbitration for your matter. Several common types of arbitrations are described below.

Binding arbitrations are the most commonly used and must be agreed upon in a pre- or post-dispute contract or stipulation. The arbitrator's decision is final, binding, and only subject to appeal under limited circumstances. This type of arbitration is one of the most cost-effective, as it yields a final determination of the case without further proceedings.

Baseball arbitration is a form of binding arbitration wherein each party selects one final number or amount, and the arbitrator must choose among those numbers as the dollar figure for the award. This type of arbitration is also cost-effective, as the arbitrator will probably not spend as much time as in other types of arbitrations in rendering a decision; most likely, he or she simply has to choose from between two numbers.

Night Baseball arbitration is similar to baseball arbitration, but the parties' figures are not revealed to the arbitrator. The arbitrator will assign a value to the case and the parties agree

to accept the high or low figure closest to the arbitrator's value. Night baseball has similar cost benefits to baseball arbitration, but the arbitrator may require more time to render a decision since he or she is not aware of the parties' range.

In the less common Non-Binding arbitration, the arbitrator's award is merely advisory and parties do not give up their right to a jury trial. This may be your least cost-effective option, since it will not always bring finality to your case.

A Mediation-Arbitration (commonly called a Med-Arb) is a hybrid form of arbitration that involves combining the benefits of a mediation with the finality of an arbitration. Upon the mediator/arbitrator's consent, the neutral will conduct a mediation to aid the parties in settling their matter. If a settlement cannot be reached, the neutral switches roles and will arbitrate the matter. The highly cost-effective mediation portion (limited preparation and documentation needed for both the attorney and the mediator) may result in a settlement. If it does not, the arbitrator will likely need less time to prepare and familiarize herself with the case since she just served as the mediator and your client will still get a final resolution of his or her case.

### Choice of Rules

Your choice of rules under which the arbitration will be administered will help you avoid unnecessary or unpredictable delays in the selection of arbitrator process and in the conduct of discovery. You should keep in mind the following factors:

1. **Discovery:** Do the rules selected allow for adequate discovery? Do they permit much more than necessary? Extensive discovery can create delays in the arbitration, increasing costs.
2. **Selection of the Arbitrator:** What is the process for selection of the arbitrator? Do parties get input on the selection or the selection process? What is the timing for the selection of the arbitrator? A lengthy selection process could be costly.
3. **Allowance for party-agreed procedures:** Do the selected rules permit parties to adjust or streamline processes as needed? Such adjustments can directly affect costs, since the case proceedings can be tailored to each case's needs.
4. **Optional Appeals:** Do the rules allow for an appeals option? Under what circumstances can this option be invoked? An appeal of an arbitration award extends the life of a case, reducing the ability to predict costs and impeding on the finality of the decision, once made.

*(Continued on page 12)*

### Number of Arbitrators

Your arbitration clause may dictate whether you will use a sole arbitrator, or a panel of arbitrators. If not, using a sole neutral may be appropriate based on the type, value, and complexity of the matter. A sole neutral arbitrator can efficiently manage all issues connected with the case from scheduling and discovery, through the hearing and decision. Not only will you keep costs down, you will save time. Having only one arbitrator to worry about when it comes to scheduling will help keep the case moving along without delay.

Alternatively, a dispute with broad issues and numerous witnesses may warrant the additional expense of an arbitration panel.

With a tripartite panel, one special consideration is whether to have a fully neutral panel or to have party-selected arbitrators remain non-neutral. Non-neutral party arbitrators could easily cost more than an all neutral arbitration panel because parties often spend more time and cost briefing and meeting with their party arbitrator than the rest of the panel. It is often more cost-effective to have a neutral panel since you can brief them and meet with them all at once, without any extra briefing or meetings.

Selecting the arbitrator requires careful consideration based on the specifics of your case. Options range from practicing attorneys doing ADR part-time to retired federal judges. Consider whether it is critical for the arbitrator to have extensive background knowledge in the subject matter, or whether a proven ADR track record will be important to selection. Educating an inexperienced arbitrator can be time-consuming, and thus, costly.

### The Arbitration Proceeding

Throughout the process, steps can be taken to save both time and costs, especially when it comes to the hearing format. Use of alternatives to standard court style hearing can greatly reduce expenses. Initial case management conferences and other preliminary hearings, in which personal appearance is not crucial, can be easily handled via teleconference. Appearance by phone is becoming more commonplace as a way to reduce travel expense, save time, and to resolve issues more quickly.

Paper Arbitration, also called Arbitration by Mail, is another option to consider. All arguments are submitted in writing and no formal hearing is held. Smaller cases with limited issues may be good candidates for this format.

Once the type of arbitration has been selected, and the neutral arbitrator or arbitration panel has been appointed, an

arbitration management conference should be scheduled. This preliminary conference, typically held via teleconference, is an opportunity for the arbitrator to meet with counsel to confirm rules and identify parties, discuss discovery needs, set briefing schedules, hearing dates, and to handle other preliminary issues.

Following this conference, the arbitrator's preliminary hearing and scheduling order will serve as your road map. Subsequent case management conferences may be scheduled to follow up on progress and to insure the case continues to proceed in a timely fashion. In addition, you should familiarize yourself with the rules by which the case will be governed, the arbitrator's preferences and requirements with regard to briefing format, page limitations, and acceptable forms of service. Taking this extra step will save time and reduce delays as the case progresses.

### Hearing length

When selecting the hearing length, you may be limited by the case rules or agreed upon timelines. Bifurcated proceedings can reduce hearing length by allowing for certain issues to be decided early on. Some issues may be appropriate for decision on papers only, or may be resolved via informal briefing and telephonic hearing.

Calculate your needs based on exhibits, number of witnesses and expected duration of their testimony. Although the goal is to control costs, you don't want to cut yourself short when it comes to the amount of time for the hearing. Keep in mind that coordinating additional time on short notice can be quite difficult when dealing with busy neutrals, attorneys and witnesses and will cause unnecessary delays. If possible, consider scheduling extra hours or days as a cushion to insure the case can be completed within the allotted time. When time is limited, use of a chess clock or other timing method can help to keep the hearing moving along.

### Limit Discovery

Typically set forth by the rules, pursuant to party agreement, or as deemed appropriate by the arbitration panel, discovery can become quite costly if not kept in check. In more complex matters, use of a discovery referee may be warranted. Though this adds additional cost, often the benefits can far outweigh the expense. The referee's fees could be significantly lower than that of the arbitrator and the referee can bring quick resolution of discovery disputes through informal hearings, often via teleconference.



### Limit Briefing

Briefs, exhibits, and any other documentation submitted should be concise and easy to navigate. If not limited by the arbitrator's guidelines, paring down unnecessarily extensive documents can save countless hours of preparation time for you, your attorney, and the arbitrator. Informal letter briefs, if allowed, can be both time and cost efficient. Use of electronic exhibit presentation, rather than costly blowups, can greatly reduce production costs and are easily transmitted.

### Hiring Court Reporter

Parties should consider whether a court reporter will be needed during hearings. This may be something to discuss on the initial conference call with the arbitrator. In shorter disputes involving less complex issues and documentation, a reporter may not be necessary. Determine whether it will be your duty to arrange for the reporter and how the costs will be allocated. Costs will also vary depending on whether simple transcripts or

electronic links are necessary. All details and scheduling should be confirmed well in advance of the hearing to avoid additional expense and delay.

### Other Cost Considerations

A few other matters to consider regarding the cost of your arbitration: Does your arbitrator provide hearing rooms? If so, are they sufficient for your case, and is there additional cost involved? What amenities are available? Will there be access to copier, fax, computer, wireless internet, power point projector? Inquiring about these items early will save time and money at hearing time.

As an integral member of a team working on your firm's cases, you can shape the arbitration process to make it work best for your client and your attorney. Taking full advantage of arbitration's cost-effective benefits makes sense for any party with budget concerns. □

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### *Elder Abuse (Continued from page 6)*

are often heard on an expedited basis. The statutes provide for recovery of attorneys' fees, if the abuser is found guilty of recklessness, oppression, fraud or malice.

### Caregivers and the Gift Restriction Statute

While it is important to have laws in place that protect the elderly, there is a California statute, the Gift Restriction Statute, which is causing unintended problems for caregivers and others, who are given gifts by those for whom they care. The Gift Restriction Statute invalidates a donative transfer, such as in a will, to certain beneficiaries. Generally, these beneficiaries are the drafter of the donative instrument, the transferor's care custodian (if the transferor is a dependent adult), or a fiduciary of the transferor who transcribes the donative instrument. For example, say a disabled woman, in gratitude to her long time

caregiver, leaves the caregiver a large sum of her estate in her will. That caregiver will be disqualified from receiving the gift unless the caregiver can prove that the gift was not the product of duress, menace, undue influence or fraud. The proof can be made by either a certification of an independent attorney who interviewed the transferor about the transfer, or by clear and convincing evidence in a court proceeding.

The Gift Restriction Statute, as written now, is unfair to the beneficiary, who is assumed to have obtained the gift by duress, menace, undue influence or fraud. Until the State Legislature amends the statute, a transferor should consult with an attorney, to determine whether the Gift Restriction Statute applies to the intended gift, and to obtain certification that the gift is freely and validly given. □



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# We Did It! How To Have A Successful Fundraiser

Submitted by  
Marin County LPA

Imagine my dismay when, after taking a short sabbatical from my website duties for Marin County LPA, I discovered all of our current website data had mysteriously disappeared. Apparently, our webmaster's server had crashed and our site reverted to the original data that had been loaded when the site was created several years ago. After many unsatisfactory contacts with the webmaster and lots of wasted time on my part trying to fix the darn thing, I did some research and presented alternatives to our membership. They were convinced that a professional and properly working website was essential to helping our association grow, and our board decided to hire a new webmaster to build an updated website we could point to with pride. The only problem was that our treasury coffers were almost empty. What to do? Have a fundraiser! But, what would that be?

Several of our members are very talented and creative people (in addition to being stellar legal assistants) and they stepped up to the challenge. Tisha Thompson, with help from Kate Athias and Kim Joffe-Corners, volunteered to create handmade jewelry for sale at a booth at the February Quarterly Conference held in Concord. We contacted LSI and purchased license agreements to use the LSI and CCLS logos. Tisha, Kate, and Kim designed earrings, necklaces, key chains, magnets, pins, and charms based on those logos and other original ideas. Kate designed a special logo for MCLPA and created one for the hosting association, Mt Diablo LPA, based on their conference theme of 'Around the World in Three Days.' The jewelry itself was created largely from recycled

materials and the 'shrink-a-dink' method. Tisha generously donated additional pieces of her beautiful, handmade jewelry to fill the table. Tisha, Kate, Alison Gardner, CCLS, and I took turns staffing the booth throughout the conference.

I'm very pleased to say that we reached our goal of at least \$500 in sales! This will go a long way towards getting our website back on track. And now for the lessons learned:

1. Check your website frequently and stay in touch with your webmaster, unless you enjoy unpleasant surprises.
2. The true wealth of your association is in its people. Look for the hidden resources in your membership and ask for their help to solve problems.
3. Reach out to LSI and they will help, too! We were successful only because our members were generous with their talents and time, and people attending the conference stopped by our booth to find out why we were there and what we had to offer. Many people chose to support our cause by purchasing jewelry and we thank each and every one of you.

If you missed out on acquiring your favorite piece of jewelry because many pieces were one of a kind, or you were just so busy attending all the workshops and meetings, or (horrors!) you didn't make it to conference at all, Tisha will be happy to create a unique piece just for you or your association. For special orders please contact her at [ttisha@gmail.com](mailto:ttisha@gmail.com). And good luck with your next fundraiser! ▣



*Kristi L. Edwards, CCLS has been a legal secretary for 17 years. She is legal assistant and office manager for Burroughs and Froneberger in San Rafael, a transactional and estate law firm specializing in probate litigation. Currently serving as governor, she has held all offices of Marin County Legal Professionals Association, and was given honorary membership status at their 50th Anniversary Luncheon. She lives in Marshall on Tomales Bay with her husband of 35 years who has now given up trying to introduce her to sailing and kayaking, since she'd rather play her flute instead!*



# Inside the Educational Publications of LSI and Educational Opportunities Available to the Legal Professional

LSI Educational Program Coordinator



*Jennifer L. Page, CCLS has been in the legal field since 1989. She obtained her Paralegal Certification from St. Mary's College in 1991 and her CCLS designation in October 2008. Jennifer has worked with J. Frank George for 12 years representing plaintiffs in wrongful death, medical negligence and personal injury cases.*

*Jennifer is an honorary life member of Marin County LPA and has served both her local association and LSI in a variety of chairmanships. She is currently serving LSI as the Educational Program Coordinator and resides in Novato, California with her husband Tony, their daughter Emma, Pug Olive, and cat Midnight.*

**D**o you know all that you need to know about the educational publications and educational opportunities available to the legal profession that LSI currently has to offer?

LSI currently has three publications available to assist you in your educational needs as a legal secretary, legal assistant, or paralegal.

**LSI Legal Professionals Handbook:** Referred to as the LPH. This is an in depth, two-volume set covering all aspects of the legal profession. This publication includes deadlines, step-by-step instruction and sample forms on what to do and how to do it, including cross-references to code sections and other legal publications. This publication is updated twice a year by the Publication and Revision Committee of LSI. To order your own copy, contact The Rutter Group 800-747-3161 extension 2.

**Law Office Procedures Manual:** Referred to as the LOPM. A procedural handbook for California courts, with cross-references to code sections and other legal publications. This publication is updated twice a year by the Publication and Revision Committee of LSI. To order your own copy, contact The Rutter Group 800-747-3161 extension 2.

**Legal Secretary's Reference Guide:** Referred to as the LSRG. A general reference for experienced staff and useful for training office personnel. This publication is revised by the Continuing Education Council of LSI and available for purchase through [www.lsi.org](http://www.lsi.org).

If you are interested in studying to sit for the California Certified Legal Secretary exam, held twice a year, both the LPH and LOPM are valuable tools in helping you prepare. Additionally, LSI has the following available:

**CCLS Study Kit:** This kit consists of the

CCLS Mock Exam, Gregg Reference Manual with Basic and Comprehensive Worksheets and an Instructor's Resource Manual. This kit is revised by the Continuing Education Council of LSI and available for purchase through [www.lsi.org](http://www.lsi.org).

**CCLS Mock Exam:** Contains sample questions and answers to assist in preparing for all sections of the CCLS Exam. Format is similar to the actual exam. This publication is revised by the Continuing Education Council of LSI and available for purchase through [www.lsi.org](http://www.lsi.org).

Even if you decide not to take the exam, just studying for the exam can be beneficial to you. While studying for the exam I learned of new ways to do things and even discovered I was doing a few things incorrectly!

If you are interested in presenting a training class, LSI has several publications to assist you.

**Law Office Procedures Manual Instructor's Guides:** Thirteen individual sections with a Teacher Training Chapter - designed to assist instructors in conducting training classes. Used in conjunction with the LOPM, each section contains projects, instructions to students, completed and blank legal forms, exams and answer keys. These guides are revised by the Continuing Education Council of LSI and available for purchase through [www.lsi.org](http://www.lsi.org).

**Guidelines for Preparation of a Legal Educational Program:** An 18-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. This publication is revised by the Continuing Education Council of LSI and available for purchase through [www.lsi.org](http://www.lsi.org).

I finally broke down and purchased my own LOPM and LPH; what valuable tools to have! Even though I've been a paralegal and legal secretary for over 18 years, I find myself referring to the LPH and LOPM to verify a procedure or learn a new one. The Rutter Group offers a discount to members of LSI when purchasing one or both publications.

LSI also offers educational opportunities at Annual and Quarterly Conferences. The Legal Specialization Sections put on six workshops at each conference, providing you an opportunity to attend three workshops per conference. The format for workshops can vary: one or more speakers, powerpoint presentations, roundtable discussions, a panel of speakers, and also includes a substantive handout. Additionally, if you are

a member of one or more section, you will receive quarterly newsletters directed towards specific areas of the law. These newsletters contain interesting articles, updates in the law, codes, forms, tips and tricks, and more.

Last, and certainly not least, as a member of LSI you will receive quarterly issues of *The Legal Secretary*. Articles are submitted by guest writers and can provide insight and education into a variety of topics.

I strongly urge you to take advantage of the educational publications and opportunities LSI has to offer. Even "seasoned" legal secretaries, paralegals and legal assistants can learn something new. I certainly do. □

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# How My Association Networking Kept Me Sane

Submitted by  
Ventura County LPA



*Joyce has lived in Simi Valley for over 19 years. She has been married for 28 years to John and has two children Michael and Cynthia. Joyce is a member of Ventura County LPA.*

**I**t took me a year to find the job and even then, it wasn't quite the right fit. But I thought I'd hang in until something better came along. I lasted four years and two months. Nothing better was available in Family Law in my area. At one time, I did try a new office—for a week—but I returned to the old office when my move did not work for either me or my former employer.

I had been in law for a relatively short three years having taken paralegal course work at an adult school. I first worked as a legal secretary to gain knowledge and experience in my new line of work. Working under the supervision of attorneys in private practice, I then 'grandfathered' into being a paralegal.

Some attorneys were better teachers than others. My last boss was not. I relied on LSI classes and my association meetings to educate me along the way. I used the contacts I made at the meetings to learn the practices and procedures that I needed to follow on my casework. I also used the information from the clerks if my filings or requests were rejected. Fortunately, most of my cases were in Ventura County where the clerks are more helpful than in others. In Los Angeles County, I blindly struggled with some of my cases and frankly, held my breath on others. I endured a serious learning curve.

I always knew I could vent with my association friends when I had a particularly frustrating day, week or month. Often I picked up the phone and called Cindy Frazier who also works in family law. She always left me laughing and I found I could face the rest of my day from a better place. If I had a question about civil procedure, I would call on Mae Brooks and check in with her. Mae works in a high pressure office and I could count on her to make my little problem seem insignificant compared to all the work she had to accomplish each day. Occasionally I would receive

an e-mail from Leslie Lamkin-Haynes or Olivia Newton that made me smile or thankful that I was blessed in many ways. I looked forward to their mailings even in the midst of a busy day because I knew they would lift my day.

I looked forward to our monthly dinner meetings because I could talk to people that understood what I was going through with an uncooperative boss. I attended the conferences and took advantage of all the educational opportunities that were offered. I learned from the professionals how to run an office in the most efficient manner. Other times I heard about procedures that other offices followed. I wanted to change my office to incorporate these new methods, but for the most part, I could not convince my boss to change. My excitement at learning new methods was met with indifference at the office. The attorney is ultimately responsible for anything I do in the office. But, I nevertheless felt responsible for the family law cases put under my supervision.

I often listened to association members talk favorably about their bosses. I always felt a pang around 'Bosses Night' in October when I heard the letters from happy secretaries with great bosses. I longed to be in that group of happy workers. But it was not to be.

It has been over a year at this writing since I left my position. I made it through this frustrating period with the help of my fellow members. If I had no outlet for my frustrations, I would not have been able to keep the optimistic outlook I try to maintain. I held the position of President and then Governor of the Association during this life-changing period. Even the conference times away from home helped me forget temporarily so I could enjoy members and friends. I think the conferences are a great time to let your hair down and have some fun.

*(Continued on page 32)*



# The Investment Of Self-Education

Submitted by  
Southern Butte  
County LPA



*Judith is an Independent Paralegal, aka Legal Document Assistant, who has been in business for herself for over 20 years. She has held the office of President and Governor several times for her association. Her favorite hobbies are golfing, reading, writing, friends and family.*

LSI conferences are a very special event which every member should try to attend as often as possible for several reasons. First and foremost is the opportunity to get away which is always a plus. We all need a break now and then. But more important is the chance to get a glimpse and understanding how the corporation functions, why and how it effects us as a local Chapter, and the immense learning opportunity made available. It also gives us a chance to rekindle friendships with members of other associations, experience great culinary delights, and interact with vendors who are more than anxious to share their expertise and products with you and your office, as well as receive free gifts. There is also the benefit of partaking in the vicinity outside the hotel, whether it be shopping at local stores, tasting the local cuisine, or teeing up on a golf course!

The one main purpose of LSI is to provide the opportunity to educate. They do this by the existence of LSS, otherwise known as Legal Specialization Sections. And even though they are an integral part of LSI, they are still a separate entity, for which they charge a separate annual fee of \$75 per year.

This fact was an interesting turn of events for me when I first joined LSI as I thought I was "automatically" enrolled in their educational classes because I was a member of LSI. Not so. Then I learned the reason LSS charges their individual fee for which they provide:

- a) All six section legal areas of pertinent, up-to-date information four times per year,
- b) Free admittance to any of their six section classes at any conference of your choice, and
- c) Free printed handouts at the classes.

LSS only requests that after paying your annual fee of \$75, members wishing to attend three out of their six offered classes at any conference, complete the LSS form published in the LSI Magazine or on-line and send the form to the individual Section Leader for that particular area of law. In so doing, this information provides

each Section Leader an estimated attendance for handout class materials. Although walk ins are always welcome, there is no guarantee there will be enough handouts or seats available. That is why prior notice is so important and appreciated.

Now if you don't want to pay the \$75 for all six sections for the entire year, no problem. You have the option of paying a yearly \$20 fee for each section, or you may pay the required fee one month prior to the conference for whichever class you would like to attend. The fee is double for those who are not LSI members, so there is an advantage to join a local Chapter.

For those who are concerned about the cost of joining a local Chapter and then paying the Sections as being pricey, I would like to share my professional experience with you. Several years ago, I joined (for one year) the Professional Secretaries Association. Their annual dues were \$175 twenty years ago. (I'm sure they are much more than that now.) As a Registered Process Server, the yearly dues to join CAPPS (California Association of Photocopiers & Process Servers) was \$350 five years ago (I'm sure their dues have increased as well) with only one conference per year at a cost of over \$350 just for registration. Last year's annual CALDA (California Association of Legal Document Assistants) dues (which I am a member) were \$200 with one yearly conference set at \$575.00. None of these organizations comes close to the wide range of available education in such a well-organized, well-educated, diverse manner as LSS, not to mention the involved fanfare put forth to accommodate location, depth of corporate involvement, or accountability and/or accessibility of corporate officers for such a minimal amount of money.

For me, LSS is your educational friend providing MCLE credits and Attendance forms. Therefore, LSI offers the biggest bang for the well-earned buck. Take the plunge and join the Sections, especially if you can convince your boss to pay these costs. After all, he/she is the one who, in the long run, is benefitting from your continued time, patience, and education. But if you pay the fees yourself, you are your own best investment. □



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**NO REFUNDS AFTER JULY 31, 2009**



# Winding Up CCLS Study Group for 2008/2009

CCLS Chairman



**A**s one chapter ends, another begins. Throughout this fiscal year, I have been updating you on the progress of the LSI statewide study groups. Eleven brave associations took the plunge, became part of the statewide study group, and began their registration process for potential students. Twelve brave instructors made a decision to dedicate their time to continuing education and providing assistance to anyone who wanted to become a California Certified Legal Secretary.

I am pleased to inform you all that the program worked. At the time this article is being written, the classes are in their final week and students are preparing to take the "Final Exam," which is a cumulative and comprehensive test recapping the various subjects and items that were taught or brought to their attention. Students statewide are preparing to take the actual California Certified Legal Secretary exam on March 21. There are 61 students taking the test at four locations throughout the state, 41 being students of this program. Amazing!

The success of this program was not achieved by one person alone or even a handful of people, but rather by a team of LSI dedicated professionals. The idea may have started with me, but I could never have completed everything and met the various deadlines without the assistance of Dawn R. Forgeur, CCLS and Elizabeth Bomke, CCLS. These ladies worked well into the wee hours of the night/early morning helping me organize my thoughts and materials, create quizzes

and homework, make copies, and be available for just about anything I needed assistance with.

Help, apparently, runs in abundance when you work with LSI. The instructors who took this on dedicated a minimum of 46 hours of instructional time and at least 50 hours in correcting homework and preparing for classes. They are tireless leaders and instructors, giving up their personal time in an effort to help other legal professionals in our field achieve their own personal goal of becoming a CCLS. I am sure that their students are as appreciative, if not more so than I am, for the time, dedication, and support the instructors have given to them. Thank you: Mary Rocca, CCLS, Julie Edsill, CCLS, Paula Delp, CCLS, Lorraine Bettencourt, PLS, CCLS, Lachmin Singh, CCLS, Joan Layte, CCLS, Deborah Rickert, CCLS, Maria Bishop, CCLS, Elizabeth Bomke, CCLS, Dawn Forgeur, CCLS, Jan Vornkahl, Deborah Carter, Jennifer Page, CCLS, and Liz Adame, CCLS.

How does one go about putting something like this together? With even more help, of course! Contributions and/or assistance were received from Brandon Wai of Paulson Reporting & Litigation Services; Marj Walker of Esquire; Ron Bodenmann and Johnny Bateman of Mirror Imaging; Candacey Jones of McGraw Hill; CourtCall; and of course – Kalman Zempleny II, Juan Orrego, and Stephanie Raygoza of The Rutter Group.

Once you have the materials together, you have the instructors, and then finally, you have the

*Astrid Watterson, CCLS, is a member and past President 2005-2007 of the Sacramento Legal Secretaries Association, and she is the current LSI California Certified Legal Secretary Chair. Astrid received her CCLS designation in 2003 and is a graduate from the University of California Stanislaus paralegal certification program. She is currently employed as a paralegal with the law offices of Somach Simmons & Dunn in Sacramento. Her primary focus is civil litigation with an emphasis in natural resources. Astrid has worked in the legal field since 1997 and has been teaching the Beginning Legal Secretary classes in Sacramento for four years and the CCLS study group courses over a year. She lives in Stockton with her husband Miles and two daughters, Alexis and Emily, and she commutes to Sacramento.*

students, a program such as this can truly begin. Study groups were formed and associations held classes once a week for two hours for a total of 23 weeks. Local associations, who have not had a study group and would like to participate in the statewide course, are encouraged to join. The current instructors are a great source of information as they have just been through, what I hope, has been a wonderful experience in their legal professional lives. It is truly amazing to see the transformation of a student from the first day they walk through the door to where we are now, in the last week of classes.

As one of the instructors for the Sacramento and San Francisco group, I can tell you that I am filled with pride when I see the differences in our students' demeanors, the way they can positively answer questions, walk you through the process of a probate estate; the inception of a corporation to the dissolution; a simple marital dissolution; a civil complaint from beginning to discovery to the end whether it be trial, settlement, or dismissal; a real estate transaction and understanding the differences between real property and personal property; and the way their legal vocabulary and understanding of legal ethics has grown.

All of the students have had at least two years legal experience, and in some case many more, but when they walk in to your class the first day, some think they are going to ace the class and others are unsure. However, they quickly learn that studying and understanding Gregg is not as easy as they had thought. I can tell you that after 23 weeks, students have become more assertive, have gained confidence, and have increased their legal knowledge in leaps and bounds. Those same students, who initially did not know how to start a pro-

bate process or handle a marital dissolution, can now recite the process and tell me what forms they need to use, how to fill them out, use the appropriate terminology applicable to that legal area, and can spot errors like you wouldn't believe! I can attest to the change these students have undergone. As an instructor, you see it; you feel it; you bask in the glory of your students' self-confidence.

Personally, I feel honored to be an instructor and a part of the students' lives, even if it is only for six months. I can only speak as to my own experiences, but I can tell you that even though I spent many hours of my personal time working on this program and rearranging my life for a few months, I don't

regret the time I spent with the instructors, and the time I spent with the Sacramento and San Francisco gals. This program has been the biggest achievement of my professional life and I am grateful to my family, my employer, Somach Simmons & Dunn, and LSI President, Christa Davis. They each provided support and believed in the program and why it was nec-

essary to invest the time and effort that it needed to succeed.

On that note, I am happy to inform you that at the February 2009 conference, the Governors approved another CCLS study group course. Registrations for participating associations will begin June 2009 and registrations for students will be open July through August 2009, through the participating local associations. Study groups will begin to meet September 2009 through March 2010, with the focus being on taking the March 2010 CCLS exam.

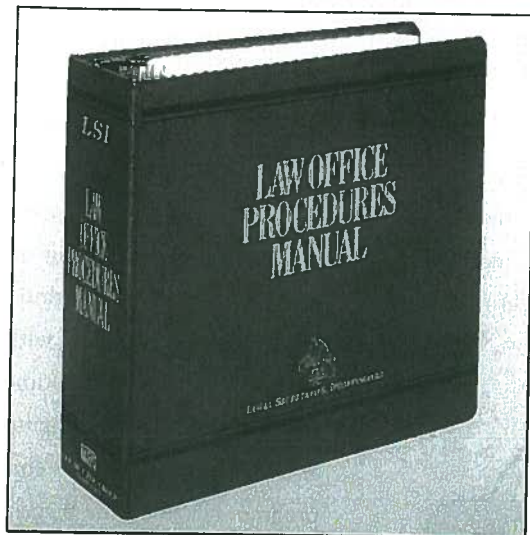
Congratulations to all those who completed the study group and best of luck to each and every one who will be taking the CCLS exam on March 21! □



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# Become A Mentor

Submitted by  
Santa Clara County LPA

Most of us have had someone in our lives that has made a difference in helping to advance our careers, enhance our education, and to help build a network towards our goals. They have been mentors to us, helping us, guiding us, and giving us opportunities.

In looking up the definition of mentor, and out of many definitions found there appears to be a description that suits us, the legal professional. It is because of our dedication to education and thirst for knowledge that we may be seen as a teacher or a more experienced person. Let's face it; a mentor is a very special person, as are we. For most of us, we have counted on a mentor at one time or another and have benefited in some way from the experience.

What are some of the benefits of being or becoming a mentor for your Association? And, how do you become a mentor? The following is offered for you to consider:

Becoming a mentor is a commitment; however, this should not be a problem for us as we commit everyday. You might ask with everything that is on our plate, how can we do this? Answer: Ask your employer to allow you to bring in a High School or College student interested in the legal field so that you can show them the ropes; internships anyone? – just for the experience they will work without pay. Approach your Association and ask them to set up a speaker's bureau, if

you don't have one in place. Go to the schools in your community, speak to the counselors, sign up for job fairs. Volunteer to be a guest speaker, show them what you know and do everyday, such as, interviewing client/witness techniques, 100 days before trial preparation, Law office practices and procedures, and the 101 in how to find that missing file. Seek out and recruit other associa-



tions and businesses that work with us in the legal field and have them work with you, such as legal administrators, Judges, and vendors. Do whatever it takes to help educate the people in your community about us, and give them the opportunity to see what we do and how we do it. Be sure to have handouts such as flyers, business cards, and brochures ready, and don't forget to include your

employers in this process. After all, it benefits them as well.

Being a mentor is an on-going, worthwhile project. Please give it some serious thought and determine whether you and your associations are able to commit. Be a part of helping someone gain entrance and knowledge into the career that you have chosen. If we consider it, the positive repercussions from becoming a mentor are incredible. Think about this, you are marketing the legal field, your office, your Association, and LSI, with the strong potential for bringing in memberships, potential employees and revenue. At the end of the day, this can only be beneficial to us. □



*Chavez has been a participant in the legal field for 44 years and an active member in LSI on and off since 1970. She is employed as the Director of Administration for Hoover & Bechtel, LLP, Family Law Lawyers. Her office prides itself on its willingness to educate and train individuals interested in the legal field. Chavez is also a Professor at Evergreen Valley College, San Jose, California. She was instrumental in setting up and has been participating in the Paralegal Program since 1996. She is a guest lecturer & Instructor at High Schools; Governmental Agencies; Community Colleges and Various Legal Associations.*

# Your Job Is About Blending In – Not Sticking Out

Submitted by  
San Mateo County LSA

**B**ecause each employee is a representative of the Company in the eyes of the public, each employee must report to work properly groomed and wearing appropriate clothing. [*Generic office dress code policy.*]

Appropriate? What is considered appropriate to my twenty-something co-worker is not the same as what I may think of as appropriate. Fashion trends in “appropriate” office attire are confusing and hard to understand. Even if the trend toward body art (piercings, tattoos and wild hair) might make you say “Those kids today!” with real frustration, think back ten years when TV attorney Ally McBeal was making micro-mini skirts popular in offices. In fact, there is an episode (which aired in 1998) where Ms. McBeal is reprimanded by a judge for wearing a skirt well above the knee into court:

Judge: My court room, like every court room, has an implied dress code. As to what’s inappropriate, the standard is the legal definition of obscenity. We know it when we see it. You will not be allowed into the room again wearing a skirt that short. That’s all.

Ally McBeal (getting up): You... You can’t do that! Judge: I just did.<sup>1</sup>

On the one hand, employers want to recruit and retain smart, hard-working people. On the other hand, work is work. It isn’t supposed to be the place where we express our individuality, though it is in our nature to stand out among the crowd (check out the desk adornments and

e-mail signatures). Just to cut to the chase, and risk disappointing many people, our choices in body ornamentation at work are not protected Constitutional rights. A clearly written and equally applied dress code is enforceable. Forget about Title VII saving your job because you got a skull tattoo on your neck.

This brings me to some rules-of-thumb when it comes to dressing for the office:

1. **If it’s saggy, pull it up.** As Barak Obama said in an interview on MTV in November 2008, “I think people passing a law against people wearing sagging pants is a waste of time. We should be focused on creating jobs, improving our schools, health care, dealing with the war in Iraq, and anybody, any public official, that is worrying about sagging pants probably needs to spend some time focusing on real problems out there. Having said that, brothers should pull up their pants.”<sup>2</sup> It isn’t just my 15-year old son who needs to pull his pants up, it is many of us in the workplace who are wearing pants too low and thong underwear too high. Nobody wants to see your underwear at work. This includes bra straps, boxers, thong strings rising above the pants, and other undergarments you may want to share with us. Please keep that stuff under wraps at work, and bring it out for your evening look.

2. **If it is stained, faded or smells funny, clean it.** Goes without saying, but it has to be on this list. Yes, your outerwear (jackets, sweaters, etc.), do need the occasional laundering. In our current cubicle work environment, the musty smell on your jacket hanging nearby does bring tears to the eyes of all who pass by. Be kind. Get it cleaned every six months whether it needs it or not. Also, please no strong perfume. It doesn’t



*Shara J. Bajurin, CCLS has been a member of LSI since 1987, when she joined San Mateo County LSA, and is currently serving her second term as Governor. She works as a legal secretary at Carr, McClellan, Ingersoll, Thompson & Horn Professional Law Corporation in Burlingame, California.*

(Continued on page 32)

<sup>1</sup>Kelley, David E. “It’s My Party,” Original Airdate (FOX): 19-OCT-98; <http://www.twiztv.com/scripts/allymcbeal/season2/allymcbeal-204.htm>

<sup>2</sup>Barak Obama speaking to MTV News on November 3, 2008



# California Certified Legal Secretary

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## 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  
5726 Lorelei Avenue  
Lakewood, CA 90712**

<input type="checkbox"/> Northern California	<input type="checkbox"/> Saturday, March 21, 2009
<input type="checkbox"/> Southern California	<input type="checkbox"/> Saturday, October 17, 2009

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 \$25 late fee, in addition to the fees listed below, if space is available.

EXAMINATION FEES*			
LSI MEMBERS**		Non-LSI MEMBERS	
Registration fee:	\$ 15.00	Registration fee:	\$ 55.00
Examination fee:	\$ 95.00	Examination fee:	\$ 95.00
Total	\$110.00	Total	\$150.00

Enclosed is a check in the sum of \$ \_\_\_\_\_, payable to LSI.

\* Fees subject to change without notice.

\*\* 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.

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Highest level of formal education completed: \_\_\_\_\_; Highest Degree: \_\_\_\_\_.

**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.

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I certify that I have completed this application truthfully. I understand that a false statement may result in the 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 \_\_\_\_\_



# What Membership Has Done For Me

Submitted by  
Capitol City LPA

I like to share with people my experience of being a legal secretary and what being involved in this organization has done for me personally and professionally. So, I thought I would write an article in hopes it will reach someone who is unsure about this career or unsure about becoming involved in a local association.

Let me preface my story by saying that I was an extremely shy child and still consider myself to be rather reserved.

During my senior year of high school I attended a special program to become a word processor. I was the first person in my class to complete the training on all of the equipment in the classroom. For the last six weeks of the school year, my instructor placed me at the local social security office for work experience. Upon graduation from high school I landed a job at a foreclosure company in Walnut Creek. I was young and not sure what I wanted and I bounced around for the next few years. I worked in data entry, food service, retail, banking, and as a word processor. If I wasn't excited or challenged, I eventually moved on.

In 1989 I saw an ad for an entry level legal secretary job. My mother had passed away six months prior, but I remembered her always telling me that I should become a legal secretary. So I sent in my resume. I had the basic secretarial skills — I just needed to learn the legal aspects. This wonderful attorney, Barbara Lanier, hired me and was willing to take the time to teach me. I was nervous and excited about this new challenge. I was also proud and knew that my mother

would have been proud to see her daughter was now a legal secretary.

Shortly after I started working as a legal secretary, I found a Beginning Legal Secretary training course. It has been awhile, but I believe that course was offered by Mt. Diablo Legal Secretaries Association. That training course was an excellent start for me. My boss was also very thorough with instructions for me until I learned the ropes. Within a few years I began attending Contra Costa County Legal Secretaries Association ("CCCLSA") meetings and became a member of CCCLSA. In no time, I had a position on the Board of CCCLSA.

I remember that day in 1996 when the nominating committee chairperson of CCCLSA called me and asked if I would serve as President of CCCLSA. OMG! I had to take a little while to think this one over. I hadn't been involved all that long and I was still very shy and unsure of my skills. Ultimately, I decided that this was not a huge group, that these were good people, and that they would support me and guide me on this journey. So I pushed myself out of my comfort zone and accepted the nomination and became President of CCCLSA.

During my installation as CCCLSA President, I was nervous because I knew I was going to have to give an acceptance speech. My boss served as the installing officer and my family was also in attendance. I had written and practiced my speech and it turned out just fine. Now I had broken the ice of speaking in front of people and every single time I do it I am more at ease.

*(Continued on page 30)*



*Michelle Rodgers, CCLS is a legal assistant with Stern, Van Vleck & McCarron, LLP. She has been a legal secretary for 20 years.*

*Michelle earned her CCLS in 2001 and holds a paralegal certificate as well. An LSI member since 1992 when she joined Contra Costa County LSA, Michelle has held many offices. She currently serves LSI as a member of the CCLS Certifying Board and represents Capitol City Legal Professionals Association as their Governor.*

*Michelle has been married to husband Tom for 20 years and enjoys living in Grass Valley with their two sons, Matt and Tyler.*

The knowledge I gained by attending educational membership meetings with CCCLSA and workshops offered by BALSF and LSI helped me tremendously. It wasn't long before my boss and others around me would come to me for answers to procedural questions.

When I started working with Barbara Lanier, her practice included personal injury, family law, and a little bit of probate. During my time with her she transitioned away from family law and focused more on estate planning. When my second son was born I decided to stay at home for a while. A few years later when I was ready to reenter the work force, I would have been happy to go back to work with Barbara, but I decided I wanted to expand my horizons and try my hand at a new field of law. Because of my involvement in my local association, I was introduced to Leslie A. Levy, Esq. who had her office near my home and was doing civil litigation specific to real estate. Had I not been involved in my local association, I'm sure I would have missed that opportunity.

Shortly after starting this new job, I attended Alameda County LSA's Civil Litigation course. Again, it was very helpful to me and I would highly recommend these type of training courses to anyone.

While I was a stay-at-home mom, I attempted to study for the California Certified Legal Secretary ("CCLS") exam, but I wasn't ready and decided to put that goal on hold. A few years

later three other ladies and I started a CCLS study group. The three of us that took the exam in 2001 all passed. Because I still was not entirely confident in my skills, I thought that the CCLS Certifying Board had made the test easier that particular year and I had just lucked out. I have been informed that is not the case.

In 2002, then LSI President Kay J. Thornberg, called and asked if I would serve as the Transactional Law Legal Specialization Section Leader. Again OMG! I had to take time to think about this. This was not just for my little local association; it was for our state organization. I decided to step out of my comfort zone again and challenge myself. So I said "yes." What a wonderful experience that was. I so enjoyed the members of the Legal Specialization Section ("LSS") team and was proud of the work that we did. Education is really what LSI is all about and that is what I was helping LSI to provide to its members and anyone else who wanted to attend the LSS workshops.

Because of the knowledge I gained through my work experience, attending educational meetings, seminars, and workshops, and my own willingness to seek out answers, I was handling more than your average legal secretary. At the end of 2003, Leslie A. Levy certified me as a Paralegal.

In 2004, my husband and I decided to move our family to the Sierra Foothills in Northern California. I needed to find a job outside of my local association's area. Since I had regularly



attended LSI conferences and because of my involvement with our state organization, people in the Sacramento area knew me and I was able to network again to find employment. This time I decided I wanted to work for a larger firm. I wanted all the perks that come with working for a larger firm. The agent I worked with helped me land the job I was looking for.

Capitol City Legal Professionals Association ("CCLPA") welcomed me as a member with open arms. Then in 2005, LSI President Mary S. Rocca, appointed me as an Assistant Editor to LSI's Publications Revisions Committee. Let me tell you, these PRC ladies (or the "red pen chicks") work very hard. Again, I didn't feel my proofreading skills were top notch, but I was willing to push myself and take the extra time to improve those skills. Because of the research I was doing for the PRC, checking codes, updating forms, and because of all the proofreading I was required to do, I became a better legal secretary and my bosses could see the improvement. If I didn't know the answer to a question off the top of my head, I knew where to find it.

I have learned so much over the years by being involved with my association and with LSI. My skills are continually being refined and reinforced. By sharing my knowledge with others, I reinforce my skills. By networking with others I sometimes learn a new or a better way of doing something. I love the fact that I can send an e-mail out to a group of colleagues with a question and someone will get back to me pronto with an answer and sometimes even an example of exactly what I was looking for.

While I was not unhappy with my job at the large firm in downtown Sacramento, I felt as though I was missing something. I did not feel that my skills were being fully utilized in the large firm atmosphere, and I started looking around for something different. I really didn't think that I would find the job I was looking for so I didn't look very hard. However, I kept my eyes open for the right opportunity. I wanted to be challenged and to be part of a team. Of course, I wanted to be com-

pensated well and I wanted to work with pleasant professional people. One day I received an e-mail to pass along to anyone in my association that might be looking for a legal secretary job. I passed the e-mail along to members in my association that were looking for such an opportunity, but I also decided that this particular opportunity might just fit the bill for what I desired. So, I updated my resume and submitted it. I am thrilled to report that I am now an integral part of the team at Stern, Van Vleck & McCarron, LLP just across the street from our State Capitol in downtown Sacramento. Once again, had I not been actively involved in my local association, I would have most likely missed out on this opportunity.

I enjoy being a legal secretary/paralegal. This career can be so interesting and challenging. Each case is different, as are the clients that we come in contact with. I won't say there is never a dull day, but you always know something new is just around the corner, whether it is a client, a case, or changes to rules and procedures. This job keeps us on our toes and I like that.

My involvement with my local association and our state organization has helped me to grow as a legal assistant and as a person. I am not as shy and reserved as I once was. I know that I would not be where I am today had I not gotten involved. I have made connections with legal service providers that I would not have known about and I have made many good friends throughout the state because I stepped out of my comfort zone and got involved. My husband has supported my involvement and he has seen what it has done for me on a personal and a professional level. I also believe I have set an example for my children that getting involved in an organization (professional or otherwise) can be very rewarding.

So, if you are on the fence about joining a local association or giving up some of your personal time to get involved in your local association or LSI, please remember my story and consider stepping out of your comfort zone and challenging yourself. You will find that it can truly be a valuable experience. □



cover up bad smells, and it rarely makes others happy to be stuck in a small, under-ventilated room with you. Added to this category are any articles of clothing or shoes that are falling apart or dirty beyond cleaning. People really do show up to work in old faded clothes, their scruffy tennis shoes or favorite stretch-pants. That doesn't make it a good thing.

3. Tattoos are like children, not everyone likes them as much as you do. I have grown to love the variety of tattoos I've seen on my co-workers, friends, and family. However, scrolling your name across your neck may have seemed like a good idea at the time, but it is a huge distraction at work. Statistically, you will have a tougher time during the interview with a visible tattoo, and some employers will fire employees who get them. Unfair? Maybe. But totally legal.

4. Piercings and Wacky Hair-Do's. Have you seen the commercial of the guy with the stain on his shirt during a job interview? The interviewer can't stop looking at the stain (and the stain begins to talk), and the interviewee is not being heard over the talking stain. Weird, yes. Totally true, however. Unusually placed body piercings or colorful or wacky hair-do's

draw attention to that part of the body, and on first meeting (or twelfth meeting), others will be staring at the visible piercing or unusual hair and not hear what is being said. This works against you when trying to establish a smart, professional appearance. Having said that, it is possible to have piercings and trendy hair-do's that are covered or modified for the workplace.

Looking at myself and my long history of wearing clothes to work, I can say I have never been stylish or fashion forward. Over the years, I have looked down to see that my shoes don't match (each other), and that I've forgotten to add "apply make-up" to my morning routine. These days, I feel accomplished if my shoes match, and I have at least applied some lipstick before sitting at my desk in the morning. I strive to come to work covered and not offend my co-workers with too much cleavage or strong perfume. As for the tattoos and body piercings, I will try to keep them in places I can only show you after hours. It is going to make us more successful if we stick out because we have amazing job skills rather than an amazingly odd style. □

I know who I can call to make me feel better—the members of my association who understand the system and understand attorneys. I could not possibly explain my experiences to someone other than these friends. A law office is full of stress and rules and procedures and most of all, it has people with feelings and emotions whether they be clients or employees. The statement, "No one told me it would be like this" is very true of a law office. It is unlike any other office. I thrived on the stress but withered seeing the manner with which my ex-boss treated people. I am not sad that I am removed from that office. It's only the pay check that I miss. I was saddened that I could not complete my cases before leaving because I knew they wouldn't be given the same care that I was able to administer. It has been a long year of grieving.

So if any of you reading this article feel you are alone and no one would understand your situation, I ask you to turn to your association and conferences to help you through the bumps in the road. The network is there for you and your

experience may help another person make it through another day, week, month or even year. I am a good listener if you need an ear or two, seek me out at the conferences and I will be there for you too!

Continuing with good news - I have completed my studies and have received my certificate in Mediation/Negotiation from UC Santa Barbara Extension. Presently, I volunteer in the Small Claims courts in Simi Valley and Ventura. I feel I am in a place I was being prepared to hold for most of my life. I am eventually going to be paid to bring people of opposing viewpoints to agreement. I love going into mediation with only my wits. I don't miss the paperwork. I still work with attorneys and unhappy people, but now it is pointed toward a solution rather than a seemingly endless extension of court appearances. In this economy, people need alternatives to hiring an attorney for the simple agreements. There are always couples headed for divorce that are not fighting over important issues. Mediation is their solution. And it is also mine. □

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Brooke Atherton, CCLS, LSI® Marketing Committee Coordinator  
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Work - (530) 877-6332 -- Fax (530) 877-7054  
[paralegalbam@sbcglobal.net](mailto:paralegalbam@sbcglobal.net)

# LEGAL SPECIALIZATION SECTIONS

## *Of LEGAL SECRETARIES, INCORPORATED*

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Complete and mail with your check made payable to LSI, for \$20 for each section, or a total fee of \$75 per year to join all SIX sections simultaneously if an LSI Member, or \$40 for each section or a total fee of \$150 per year to join all sections simultaneously if joining as a non-LSI member.

Mail to: **Margaret Tovar, CCLS, Legal Specialization Coordinator,**  
12412 Camilla Street, Whittier, CA 90601-3305

Enclosed is payment of my dues for the fiscal year 8/1/08 through 7/31/09 for the following Section(s). Please check appropriate boxes below for the sections you are joining.

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## LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>BRASS TACKS*</b> A guide instructing local officers and chairmen on how to perform their respective duties. Contains check lists, calendars and forms. (Rev. 5/06)	\$ 5.00		\$
<b>CAREER PROMOTION/SCHOLARSHIP <i>NOT JUST A SECRETARY</i> BOOKLET</b> Currently under revision and not available at this time			
<b>CCLS BROCHURE</b> Tri-fold brochure promoting the benefits of taking the CCLS Exam. Includes tear-off to request application form and information kit. (Rev. 2/08)	N/C		
<b>CCLS MOCK EXAM (Revised 2009)</b> Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	20.00		
<b>CCLS PIN</b> A ½" high, 10-karat gold pin with CCLS logo. For the CCLS.	35.00		
<b>CCLS STUDY KIT</b> Contains Mock Exam (see above), Gregg Reference Manual with Basic and Comprehensive Worksheets and Instructor's Resource Manual.	120.00		
<b>GUIDELINES FOR HOSTING LSI CONFERENCES*</b> An instruction guide, including forms and samples, essential to any association considering a bid to host an LSI Conference. (Rev. 2/08)	N/C		
<b>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</b> A 34-page guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (Rev. 8/03)	5.00		
<b>HISTORY BOOK AND SCRAPBOOK COMPETITION RULES AND GUIDELINES*</b> 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. 11/05)	5.00		
<b>HISTORY OF LEGAL SECRETARIES, INCORPORATED</b> A 50-page memory of people, places and events since 1929. (Rev. 2/08)	5.00		
<b>LAW OFFICE PROCEDURES MANUAL FLYER</b> An 8 ½" x 11" advertisement of the LOPM. Includes listing of contents and Order Form. (Rev. 1/02)	N/C		
<b>LAW OFFICE PROCEDURES MANUAL INSTRUCTOR'S GUIDES</b> 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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MISCELLANEOUS CHAPTER (Rev. 9/07)	7.00		
<b>LEGAL SECRETARY'S REFERENCE GUIDE</b> A legal procedure guide designed to assist local associations in conducting a training class. Also useful for training office personnel and as a general reference for experienced staff. (Rev. 4/07)	30.00		
<b>LSI BYLAWS AND STANDING RULES*</b> As currently adopted by the LSI Governors.	5.00		
<b>TOTAL THIS PAGE</b>			<b>\$</b>

\*Item available to LSI members only.

(Prices effective 3/06/09)

# LEGAL SECRETARIES, INCORPORATED ~ ORDER FORM

ITEM	UNIT PRICE	QUANTITY	TOTAL
<b>LSI LEGAL PROFESSIONAL'S HANDBOOK FLYER</b> An 8 1/2" x 11" advertisement of the LPH. Includes listing of contents and Order Form. (Rev. 1/02)	\$ N/C		
<b>LSI LEGAL SPECIALIZATION SECTIONS BROCHURE</b> Lists Sections offered and reasons for joining. Includes Section Membership Application. (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP BROCHURE</b> Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 2/08)	N/C		
<b>LSI MEMBERSHIP PIN*</b> A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	3.00		
<b>LSI MEMBERSHIP PIN* (Magnetic)</b> A 3/4" high oval gold-tone pin with blue and white enamel overlay. LSI logo in center and "Legal Secretaries, Incorporated" inscribed on circumference. For all LSI members.	5.00		
<b>LSI ROSTER*</b> Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents and governors.	N/C		
<b>MEMBERSHIP APPLICATION FORM*</b> An 8 1/2" x 11" form adopted 5/01 by LSI for use by all local associations. Includes request for Legal Specialization Sections information. Local associations may add second-page for supplemental information. (Rev. 5/08) Can be transmitted as an e-mail attachment (Word format), if so requested.	N/C	<input type="checkbox"/> E-mail -or- <input type="checkbox"/> Printed	
<b>NEW MEMBER PACKET*</b> A 2-pocket folder containing letter from LSI President, LSI membership information, Specialization Sections Membership Application, list of benefits and providers, CCLS information, Legal Professional's and Law Office Procedures Manual flyer and Code of Ethics. Local associations may insert additional material. For new local association members only.	N/C		
<b>PRESIDENT'S PENDANT*</b> A 1" high oval gold-tone pendant with blue and white enamel overlay. LSI logo in center and "Legal Secretaries Association" inscribed on circumference. Eye for necklace chain on back. For local association presidents.	7.00		
<b>PRESIDENT'S PIN*</b> Same as pendant (see above), but with pin on back.	7.00		
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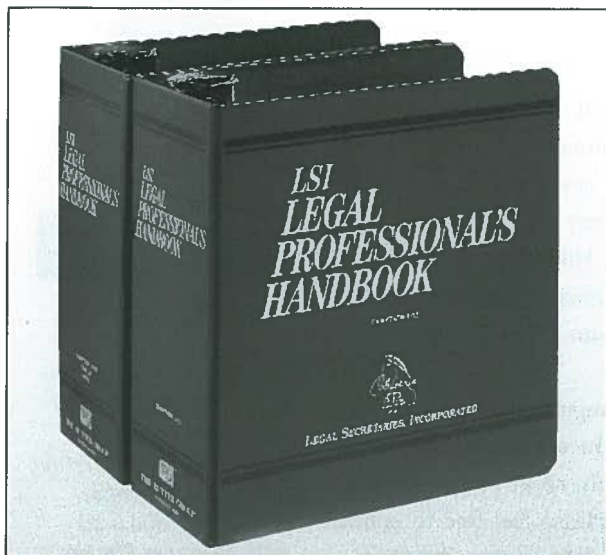
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# A Message From The Editor

Editor,  
*The Legal Secretary*



*Deborah Rickert, CCLS is editor of The Legal Secretary. She has served LSI as LSS Civil Litigation Leader, PRC Assistant Editor, Registrar, and Editor of The Legal Secretary 2004-2006. She is currently serving as President of Orange County LSA. Deborah has been a legal secretary for over 25 years, and is beginning her 11th year working at Latham and Watkins LLP in Orange County, California.*

**I**t's hard to believe that Annual Conference is upon us again. Thanks go out to everyone who contributed to the February issue of *The Legal Secretary*, and to those who contributed to this issue as well.

I am really proud to be a member of this organization. We have a wonderful past and are beginning our 75th year as Legal Secretaries, Incorporated. LSI is a vital part of each local association. In addition to providing excellent continuing education, as Christa Davis says in her article, "We really do care about the well-being of our fellow members."

I encourage each of you to attend a Conference hosted by a local association, attend the educational workshops offered, and make new friends. With the help of members like you, LSI will continue to be even more successful in the

legal field and in our local associations.

Please keep the submission of articles coming! The associations assigned for the August issue of *The Legal Secretary* are: Alameda County, Antelope Valley, Beverly Hills/Century City, Butte County, Capitol City, Conejo Valley, Desert Palm, El Dorado County, Fresno County, and Humboldt County.

Submissions for August are to be received no later than June 1st. In addition to the articles, I also need a photograph, short biography and a completed Checklist. Please feel free to contact me for a copy of the guidelines or a Checklist.

As always, I hope to hear from you with your comments and suggestions on how we can improve the upcoming issues of *The Legal Secretary*. □



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## DATES TO REMEMBER 2009

May 12, 2009	Deadline to sign up for Legal Specialization Section Workshops
May 14-17, 2009	LSI 75th Annual Conference Hosted by Long Beach LSA Long Beach Hilton
June 1, 2009	Deadline for submission of articles to The Legal Secretary
August 1, 2009	Deadline to postmark August conference registration to receive discount
August 1, 2009	Deadline to make hotel reservations for August conference
August 14-16, 2009	First Quarterly Conference Hosted by Desert Palm LPA Palm Springs Hilton, Palm Springs, California
August 19, 2009	Last day to submit CCLS Exam Application to the CCLS Certifying Board
September 1, 2009	Deadline for submission of articles to The Legal Secretary
September 18, 2009	Last day to submit CCLS Exam Application to the CCLS Certifying Board with payment of late fee
October 18, 2009	California Certified Legal Secretary (CCLS) Examination Northern and Southern California locations
November 12-15, 2009	Second Quarterly Conference Hosted by Capitol City LPA/Placer County LPA Marriott Sacramento, Sacramento, California



# 2008-2009 LSI Roster



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CHRISTA DAVIS  
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E-mail: cdavis@staleyjobson.com

### Vice President

BROOKE ATHERTON, CCLS  
Home: (530) 872-1074; Office: (530) 877-6332  
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E-mail: paralegalbam@sbcglobal.net

### Executive Secretary

SANDRA T. JIMENEZ, CCLS  
Home: (760) 353-8736; Office: (760) 352-5421  
Fax: (760) 352-5422  
E-mail: sjimenez52@yahoo.com

### Treasurer

MARY BEAUDROW, CCLS  
Cellular: (415) 717-5675; Office: (415) 268-7281  
Fax: (415) 268-6412  
E-mail: marybeau@comcast.net

## APPOINTED OFFICERS

### Executive Advisor (CEC)

LORRAINE BETTENCOURT, PLS, CCLS  
Home: (209) 356-0815; Office: (209) 384-7887  
Fax: (209) 384-5865  
E-mail: plsccls@aol.com

### Parliamentarian (CEC)

KAY BLISS, CCLS  
Home: (951) 689-3306; Office: (951) 826-8265  
Fax: (951) 686-3083  
E-mail: kay.bliss@bbklaw.com

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Home: (916) 684-9423; Office: (916) 920-5286  
Fax: (916) 920-8608  
E-mail: dnesbitt@comcast.net

### Editor, The Legal Secretary

DEBORAH RICKERT, CCLS  
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E-mail: deborah.rickert@lw.com

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### Legal Specialization Sections Coordinator (CEC)

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Fax: (209) 576-7139  
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## LEGAL SPECIALIZATION SECTIONS

### Coordinator

MARGARET TOVAR, CCLS  
Home: (562) 699-2006; Office: (213) 452-0115  
Fax: (213) 625-0931  
E-mail: mtovar@kbblaw.com

### Civil Litigation

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E-mail: dnesbitt@comcast.net

### Editor, LSI Legal Professional's Handbook

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Home: (209) 852-2790; Office: (209) 576-7777  
Fax: (209) 576-7139  
E-mail: luccds@hughes.net

### Editor, Law Office Procedures Manual

MARIA E. BISHOP, CCLS  
Home: (925) 283-5226; Office: (925) 284-7788  
Fax: (925) 284-7789  
E-mail: mbishopccls@hotmail.com

### Assistant Editor

KAREN JONES  
Home: (818) 360-5366; Office: (310) 284-5695  
Fax: (310) 557-2193  
E-mail: karenjacobjones@aol.com; kjones@proskauer.com

### Assistant Editor

LORETTA R. MAXWELL, CCLS  
Home: (213) 309-0929; Office: (714) 634-2522 x3616  
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DIANE M. MECCA  
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ANN BOCCIA ROSADO  
Home: (310) 833-9952; Office: (562) 435-8300 x229  
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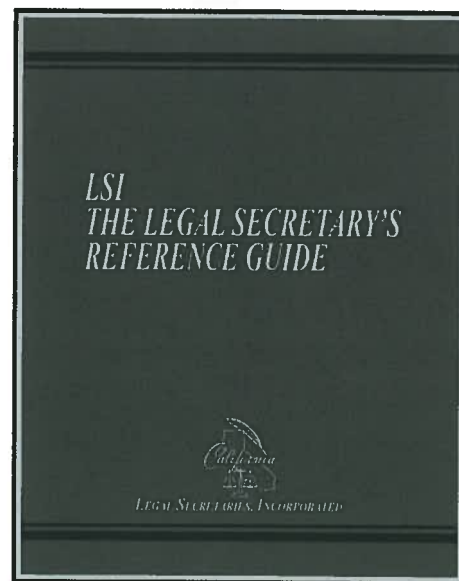
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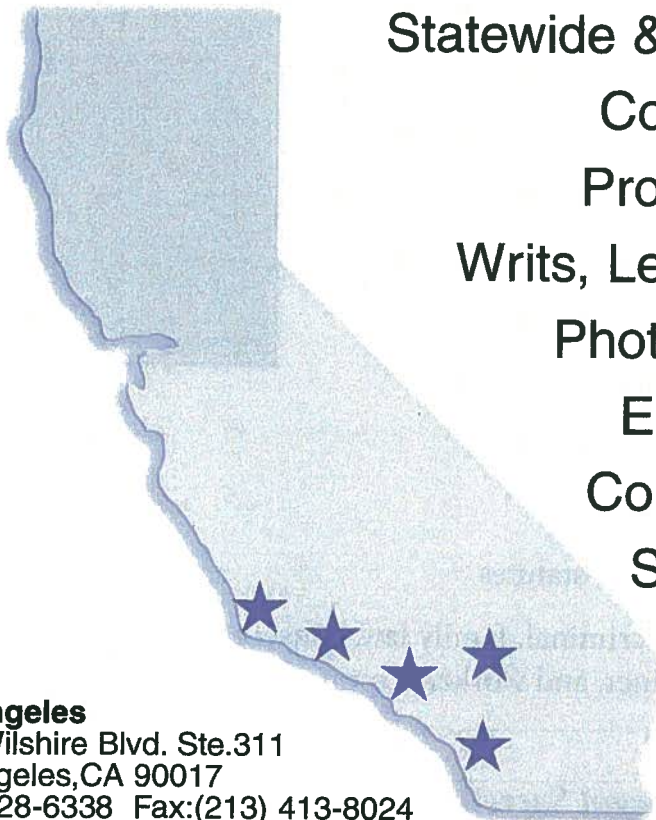
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