

THE Legal Secretary®



May 2014

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2014 LSI ANNUAL CONFERENCE *"A Musical Journey"*

BY CO-CHAIRS, MARIA BISHOP, CCLS,
AND CRISTINA MORENO
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Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS

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Rise To The Challenge

BY SANDRA T. JIMENEZ, CCLS — LSI PRESIDENT

finale



My term as President has come to an end; therefore, this is my last article to LSI members in this capacity. I will miss writing to you about the happenings and events of the most recent past conferences, about the work that was accomplished, and about all those who made that conference special. I feel somewhat emotional at this writing; however, I am ready to step down and assist the next in line to **“rise to the challenge”** of moving LSI forward. I must say I am very pleased and proud of all the accomplishments during my two-year term.



SANDRA T. JIMENEZ

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

TO RECAP ACCOMPLISHMENTS THIS PAST YEAR:

- LSI launched online training – the California Certified Legal Secretary class chaired by Terrie Quinton, CCLS, of San Diego, and the Beginning Legal Secretarial Training class chaired by Shaylene Cortez, CCLS, of Riverside. Both were very successful classes! The ground work for online training is set -- plan to see more online classes in the future.
- Cheryl Kent, PLS, CCLS, along with the team of Legal Specialization Section (LSS) Leaders also launched their very first online webinar this past year -- also plan to see more! The LSS team provided excellent seminars all year.
- Astrid Watterson, CCLS, of Sacramento, continues her stellar performance in keeping our Bylaws and Standing Rules updated. Parliamentary procedure is definitely her cup of tea. You should have the updated versions from the February 2014 Conference by now.
- The LSI website has been redesigned and is expected to be launched prior to the end of the 2013-2014 year along with the use of our new LSI logo. Mary Beaudrow, CCLS, Marketing Coordinator, and the Marketing Committee have been diligent in following through with this work.
- LSI contract negotiations with our publisher, The Rutter Group, a Thomson Reuters business, for the *Law Office Procedures Manual* and the *Legal Professional's Handbook* continue and we are hopeful that the contracts will be executed prior to the end of the 2013-2014 year. Maria Bishop, CCLS, Editor, and the Publications Revision Committee continue their work of excellence in updating our publications.
- Our Educational Program Coordinator, J. Cori Mandy, CCLS, of San Diego, along with the Continuing Education Council provided great seminars all year and laid groundwork for the first ever Day of Education event.

As we all know, it takes dedication and commitment on the part of committee chairs in achieving goals. Kudos to the LSI 2013-2014 Team -- we certainly did **“rise to the challenge”** and succeed!

FEBRUARY 2014 – ACKNOWLEDGMENT/RECAP:

A special thank you to MERCED COUNTY LPA and STANISLAUS COUNTY LPA for co-hosting the February 2014 Quarterly Conference! I truly enjoyed being in Modesto again. As some of you may recall, I was elected LSI Treasurer at the May 2006 Annual Conference in Modesto when Lorraine Bettencourt,

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PRESIDENT'S MESSAGE

Continued from page 2

PLS, CCLS, was installed as LSI President. Therefore, since I started in Modesto, it was only fitting that I would go back before ending my term as an elected officer.

We had two great Conference Chairs: Stephanie Harrison and Diane Mecca. They make an excellent team, and no matter what they do together, they get it right! The DoubleTree was an excellent conference site and the food was excellent. I commend these ladies and committees for “**rising to the challenge**” of planning and hosting a wonderful quarterly conference – awesome teamwork!

LSI Past Presidents in attendance were: Diana E. Estabrook, PLS, Linda Duarte, Patricia E. Miller, PLS, CCLS, Yvonne Waldron-Robinson, CCLS, Mary S. Rocca, CCLS, Lorraine Bettencourt, PLS, CCLS, and Christa Davis. And, more importantly, we can't forget Mr. Hospitality, our Honorary Member, Don Lee, of Merced County LPA. It is a pleasure to continue to see them at conferences and we truly appreciate their assistance, support, and participation.

As always, the Legal Specialization Sections organized informative seminars with great topics and speakers. The seminars were scheduled on Friday and Saturday afternoons. All the sections reported great attendance. I personally had the opportunity to attend the Probate/Estate Planning seminar with speaker Randy Rose, Esq. – great topic and a great speaker!

Sincere thanks to the governors for their professionalism at the Board of Governors meeting. There was quite a lot of business to come before them; however, we got past it in a smooth and orderly fashion. The Governors voted on the following:

- Two noticed Bylaw Amendments were approved.
- Five Executive Committee Recommendations, amending our Standing Rules, were approved.
- Per local association request, Palo Alto LPA's charter revocation was approved.
- The transfer of \$2,000 from the Capitol One 360 Savings Account to fund the Local Association Promotion Program was approved. These funds will provide script tickets to local associations for their members to attend conference.
- Six Continuing Education Council recommendations regarding online training and the Day of Education event were also approved.

Jennifer Page, CCLS, Executive Secretary, and Astrid Watterson, CCLS, Parliamentarian, were instrumental in discussing items on the EC Resume at the Governors' Luncheon prior to voting. Questions were answered prior to the Board of Governors afternoon session and that allowed for a smoother flow of business in the afternoon voting session. Thank you ladies!

We were honored to have the HONORABLE LORETTA MURPHY BEGEN, Presiding Judge, Family Law Department, Stanislaus County Superior Court, participate as our Welcome Speaker at the Saturday Board of Governors meeting; LUGENE BORBA, CCLS, as the Mystery Banquet Chair; and the HONORABLE PAUL C. LO (recently appointed to the Merced County Superior Court) as our Inspirational speaker at Sunday Brunch. It was a thrill to meet these special people and hear their inspirational messages.

COMING UP – MAY ANNUAL 2014 CONFERENCE

LSI will be celebrating its 80th Anniversary at our May 2014 Annual Conference and it is almost here! The conference location is Concord, California, hosted by MT. **DIABLO LPA – A Musical Journey.** With a theme like that, we all know that there will be plenty of music. Sounds like fun, fun, fun (especially the line dancing scheduled at the Friday evening reception)! Detailed information regarding LSI's May 2014 Annual Conference is included in this issue. Each local association may send three delegates from each local association. Make your local association's vote count at Annual. Read the detailed article in this issue and you will definitely be persuaded to attend – register early, you don't want to miss it!

Remember to visit the LSI website (www.lsi.org) home page and download posted conference information, including Reports and Agendas for the Pre-Annual Board of Governors Meeting, for the General Session, and for the Post-Annual Board of Governors Meeting. Also download information regarding topics and speakers for the Legal Specialization Sections Seminars. Contest winners will be announced on Saturday, and you don't want to miss the installation of President-Elect, Mary J. Beaudrow, CCLS, of Mt. Diablo LPA on Sunday!

CLOSING

I am humbled by all the support given to me as President, to the entire Executive Committee, and to the Appointed Officers and all Chairmen this past year. We joined together as a team to achieve goals, and accomplished many things during the 2012-2014 term. Everyone worked hard for the good of LSI and the result was fantastic! All the goals that I had set personally for improving LSI were realized. A heartfelt thank you to members, governors, Past Presidents, and the LSI Team for “**rising to the challenge**” in making my term as President a very productive and successful one for LSI!

I am proud to be a member of this professional organization, and it was my pleasure to serve LSI in this capacity.



MODESTO, CA | FEBRUARY 21-23, 2014

LSI Quarterly Conference





CATHERINE CULVER,

CCLS, LSI Administrator

Catherine, as you all know, is LSI's Administrator, always willing to lend a helping hand, making sure everyone is organized and on track, keeper of the stop clock, thinking outside the box and coming up with great ideas, and the go-to person when local association members have questions. Because of those attributes, she is able to address groups—large groups, such as our own. But here are a few things you didn't know about Catherine.

Catherine attended Denison University in Granville, Ohio, where she earned her bachelor's degree in Economics. In 1975, her friends urged her to attend paralegal school, telling her that the work was interesting and pay was fair. Her first job out of the UCLA Extension paralegal training was with a property developer. It was there that Catherine learned to read legal descriptions, check surveys, read title exception documents and determine what exceptions her employer could live with. But her most memorable education experience was when she was eating Christmas candy in the back of her high school (Homestead Senior High School) biology class. The teacher asked her if she had enough to share with the whole class, to which she replied, "yes," and proceeded to pass out the peppermint candies to everyone. Her teacher, Mr. Dudkiewicz, was surprised. It doesn't sound like much has changed over the years with respect to eating in class, except that these days, children have been known to get detentions for eating in class, even if they are peppermint candies.

Catherine's mentor was Roger Plotkin, during her days of risk management (insurance) for Maxxam. Roger was responsible for getting her hired by the Pacific Lumber Company and moving to Humboldt County from Los Angeles. Today, doing things right are what motivates Catherine. She states, "A good attitude goes a long way in the office. Learn all you can and stay current."

Currently, Catherine is a charter member of the Rotary Club of Fortuna Sunrise, and treasurer of the Eel River Valley Chapter of the National Society of the Daughters of the American Revolution. Catherine can trace her family tree back to the 1700s, starting with Thomas Norris, who rendered patriot service in Maryland during the Revolutionary War. She also received the Community Service Award from the Fortuna Sunrise Rotary Club in 2012-2013. Rotary International (RI) has made eradication of polio a goal. RI works for world peace through youth exchange and group study exchanges, where business people from the United States and other countries visit other parts of the world to study specific areas. It's not often that we can have an AHA moment, but it's obvious why Catherine admires these organizations.

When asked about her hobbies, Catherine told me that she enjoys golf, bridge, walking and reading. She failed to mention how much she enjoys fishing as evidenced by the photos. On her most recent trip to the Puerto Vallarta, Riviera Nayarit, she caught a Jack Crevalle, a bottom feeder fish that can grow to nearly 60 pounds. "Pound for pound, inch for inch, tooth for tooth, the toughest, fightin'est, downright meanest game fish in the sea. This ball of fire brings the total package - vicious strikes, searing, drag-scorching runs and a head-shaking, doggedly determined fighting style that continues even after he's in the boat (watch those fingers!)"



Catherine loves her job and interacting with local association members. She appreciates that LSI is so flexible with her schedule and feels very fortunate to be LSI's Administrator. We too, are very fortunate to have you as our administrator and I know I speak for everyone when I say thanks for all you do!

LS



DON LEE,

LSI Honorary Member

It gives me great pleasure to present this interview with Don Lee, LSI's Honorary Member and Mr. Hospitality. Don is always so much fun at conference, dressing up for the different themes and greeting LSI members with a smile and generous personality. Enjoy!

"You know, you should write a book, the stories you can tell." That's what usually comes to someone's mind when Don tells people that he is a retired court reporter, and a couple of vignettes he would recall. The honest truth of the matter is that 95 per cent of what Don has heard and taken down is gone, lost memories. Every day brings a new venture and new stories and new people who look you in the eye and tell you their misadventures, because that's what he has heard for 40 years.

Prior to becoming a court reporter, Don typed fast, took a typing test to get a job with the State of California while he was attending San Francisco City College back in '57. When he graduated from Galileo High School down by Fisherman's Wharf in San Francisco, he thought he would become a social worker or a psychologist, but the typing test landed him a job right away in the steno pool with the California Public Utilities Commission. During that time, typewriters still had return carriages with bells, copies were made with carbon papers and multiple copies were typed on mimeograph machine stencils. How many of us remember those days?

Don's supervisor didn't want him to waste any of his typing talents since "that's about all I had," said Don and he was ushered into the field of court reporting by introducing him to the court reporters that staffed the California Public Utilities Commission that reported at the utility hearings. During this time and while working for CPUC, Don was already attending San Francisco State at night to get his BA, which now turned into twice a week at night

attending to include court reporting school.

By 1963, Don was somewhat proficient at court reporting school, writing about 180 words a minute and still working in the steno pool at CPUC, when in May, 1963, he received "Greetings" from Uncle Sam. So off he went to Fort Ord, Monterey, for basic training, and to have his head shaved. Again, his typing skills landed him a job in battalion headquarters where he was the only clerk, had his own room, never did KP or guard duty, was driven everywhere by jeep, and literally ran the headquarters—110 miles from home—for two years. From 1963 to 1965, it was the startup of the Viet Nam era. He served two years in the reserve when he returned home to San Francisco, but says that it felt like he never left home. From San Francisco to Monterey and back and when I was completely serviced out in 1968, all Hell broke loose in Viet Nam.

In 1965, Don went back to work at CPUC, re-enrolled in night school, and in 1968, he took and passed the California Certified Shorthand Reporters licensing test to work in California. His CSR number was 1813, and today, the licensing numbers are now up into the 15,000's.

Don's first court reporting job was with the State of California Unemployment Insurance Department and that was from 1968 to 1970 where he traveled from Modesto to Bakersfield and up and down central California, for two years. What a shock to move from San Francisco to Fresno in 1968 where the temperature was 65 to 105.



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JOHN ASHBY is currently an adoption social worker for Family Connections Christian Adoptions. He and his wife, Karen, are the parents of thirteen children, seven of whom are adopted. In 2005, John and Karen were recognized by the United States Congress with an Angels in Adoption award.

Adoption from a Dad's Perspective

BY JOHN ASHBY, SUBMITTED BY STANISLAUS COUNTY LPA

Adoption is a term that brings about so many different opinions and emotions, depending on personal perspective. Legal professionals see it in one light, while adopting parents, adopted children, and birth parents all have their own views. My experience is that of a dad who has personally experienced the joy and the heartache of adoption.

I was twenty-nine years old when I married for a second time. My first shot at marriage was pretty disastrous, with my daughter and son being the only good to come from it. When the ex left, she left me with our two babies; one was seventeen months old and the other four weeks old. So, there I was a single twenty-seven year old with two in diapers. Because I was working full time, I left my babies with a great lady I knew just a couple of blocks away. She was also single, a young mother with four children. Along with providing my kids with a great environment while I was at work, she also gave me my first experience with adoption. She had four children from her previous marriage and one of those was an adopted Korean-American son. He was a great kid- athletic, feisty, intelligent and a lot of fun.

As time passed, I became closer to my children's baby sitter. She was so helpful to this young dad who didn't know much about parenting. She helped me pick out clothes for my kids, tried to improve my cooking abilities, and was a great help when one of them was sick. Through time, we grew closer and our friendship turned into an engagement. Two years after I became a single dad, Karen and I lined up our six kids at the altar of our

church, recited our wedding vows, and became a family.

We had heard that it was very difficult to put together a "blended" family successfully. We heard that many times the newly married couple found it too difficult to bring their children from previous marriages into one new union. So we, with our youthful wisdom, decided the best thing we could do was have another child... one that would tie everyone together, creating sort of joint property. Within our first month of marriage, Karen became pregnant. Within our first year of marriage, our new son was born. We were thrilled. Our family was now complete. I was thirty years old, married a second time, the father of seven children, and a grocery clerk by profession. My wife was a stay-at-home mom who ran a small daycare out of our home. We were young, happy, and broke. Money was very limited but somehow we always made the house payment and were able to feed the kids.

A few years into what proved to be a very happy marriage, we started thinking about adding another child into our family. Yes, money was still very limited, but we started thinking that even though that was the case, we had so much more than many

people in the world. We always had food to eat, a house to live in, and so much more. We already had a Korean son, so naturally we thought about adding a Korean daughter. We found a new, fledgling adoption agency called Family Connections and went to our first meeting to get more information on what would be required of us.

One of the first things we learned is that Korea would not approve an adoption to us because we had more than the four children they allow. I was angered by the news. Why would Korea possibly prefer to have their children in an orphanage in Seoul as opposed to my home with seven children in Modesto? In my thinking, we were doing Korea a favor by wanting to parent the children they had that nobody else wanted. But that is not how they saw it. Family Connections told us that if we wanted to adopt a foreign born child, we would need to pursue India.

I didn't want to adopt from India. I didn't really know any Indian people nor did I know much about them. But we were motivated to adopt so we accepted that India was going to be the country we worked with. I started to think in terms of a healthy Indian girl. You can imagine my reaction when

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the phone call came from the agency offering us a ten-day old baby boy with a club foot. What? Did they not read our file and know that we wanted a healthy girl? I promptly told them no. As we talked about that call at the dinner table that night, one of my daughters told me I was a hypocrite. We had all been praying for the right child for us and when the call came in, I turned it down. She went on to say, "What's the matter with you?" I had to admit, I didn't have a good defense. So, I called the agency to tell them we would like to move forward with the little club-footed boy.

Three months later we went to the San Francisco Airport to pick up our new child. I will never forget the joy we experienced when the escort walked off the plane carrying the basket that held our new son. When I looked into the basket I saw the most beautiful, brown baby with big black eyes looking back at me. I was immediately in love. Quickly my wife drew back the blanket to expose his feet. To our surprise they were not clubbed but in fact were very cute. We named our new son Micah. We were so enamored by him and the thrill of adopting, that we volunteered our help at the adoption agency. By the time Micah was two years old, we knew the founder of the agency very well. We decided to approach her once again about adopting a Korean daughter. Korea maintained the same requirements so an adoption from them would require creativity.

Within about two months we received another phone call. This time it was the agency founder telling us she knew of two Korean sisters who were available for adoption. They were brought over from Korea by a family that met the country's standards but the girls proved to be difficult children. The family did not want to keep the girls in their family and made them available to us. We met the girls a few days later and were taken by how cute they were. They did not appear to be happy children, but we thought

they just needed us to love them, take them to church, and teach them right from wrong, and then everything would work out well. They moved in about two weeks later. Within a short amount of time we started to see why the other family had a difficult time with the girls. They stole things...food, jewelry, money, my wife's underwear, pretty much anything they wanted. We were amazed at how well they denied any wrong doing. They were better at stealing and denying than we were at getting them to tell the truth. But, they were ours and we loved them. With ten children, two who were very difficult, we were definitely not adopting anymore children.

One day, a few years later, Karen ran into the Family Connections secretary while grocery shopping. During the conversation that ensued, Karen learned of a deaf baby boy in Calcutta that needed a home. When she talked to me later that day about the baby, something inside of me went crazy. For some reason I can't explain, I wanted this little guy. I hurt for him that just because he was deaf, nobody wanted him. I asked Karen if we could have him. She agreed. We immediately started the process to bring him over. Months later we were ready for him to come. His crib was set up; the closet was stocked with clothes, diapers, and baby blankets. We were ready. It was then that we got yet another call from the agency. This time to tell us that our baby had died. He caught a virus in Calcutta and was not strong enough to survive. For a week or so, we cried. It was so difficult to comprehend that our new little guy could die before we ever got to hold him. We were so devastated that we agreed that we would never allow ourselves to be hurt like that again.

The agency in Calcutta, however, was used to babies dying. They had a standard procedure of offering adoptive parents another child when the one they planned to adopt did not live. When we received the call from Family Connections offering us the new

replacement baby, I turned it down. There was no way I was going to set my family up for another hurt. Within a few weeks though, my wife helped me to realize that the baby Calcutta had set aside for us still needed a home. I slowly accepted that fact and agreed to adopt him. When the time was right, we once again headed to the San Francisco Airport to meet our new son. Once again, he was beautiful with big dark eyes. Once again, we fell immediately in love. Okay, this was it. No more adoptions. Eleven children are enough for anybody. We decided we were through adopting.

Several years later, Karen started working for Family Connections. Every now and then she would talk to me about available children but I held my ground really well, really well, until she brought home pictures of darn cute Down syndrome children waiting in Hong Kong for a home. There was one particular little boy that grabbed my attention. I could easily see myself as his dad. When I shared that thought with Karen, she was quick to jump on the idea. Before I knew it, we were filling out forms, jumping through hoops, and signing checks to adopt the little guy. I don't mind telling you that I was very concerned that he was not yet two years old and I was over 50 at the time.

Mother's Choice, the agency in Hong Kong where the little guy lived, responded to our interest by sending us videos of him playing. The problem was that he was always playing with a little Down syndrome girl. I was a little perturbed that they filmed her. I thought they should move her out of the way. My wife, however, thought she was cute and the way the two played together was adorable. When she said that, I knew I was doomed. About nine months later, we went back to San Francisco Airport to pick up our new little son. He was amazing, so cute, so loveable, and all ours. Another year passed before we loaded up the van with our children again and

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SHAYLENE CORTEZ, CCLS, is a legal assistant at Thompson & Colegate, and teaches the Legal Administrative Professional certificate program at Riverside Community College. She is past president of Riverside LPA where she has served in various officer/chairmen positions since 1987, is a former chairman of the CCLS Certifying Board, and currently serves on LSI's Continuing Education Council. Shay resides in Corona with her husband and two teenage sons. She is a computer geek, adrenaline junkie, #1 supporter of the high school robotics team, loves Disneyland for stress-relief, and is still trying to score tickets to Comic-Con. She has 33 nieces/nephews and 10 sisters-in-law, which should explain why she has no time for hobbies.

Online Education for LSI – Rising to the Challenge

BY SHAYLENE CORTEZ, CCLS, LSI LEGAL SECRETARIAL TRAINING/SEMINAR CHAIRMAN

By the time you are reading this, it will be May and we will all be busy getting ready for annual conference. More importantly, LSI will have put on several online educational classes for its members and the legal community. I can't wait to give my report at annual conference, as it has been a big year for us in the area of online education.

Everyone has been anxiously waiting these last few years, and I knew patience was running thin. However, there were so many things to consider as far as our platform, security, privacy, content, accessibility, and affordability. I wanted to make sure to keep LSI's quality reputation to the standards everyone expects.

Our first online class launched in January. It was a six-week class based on LSI's Legal Secretaries Reference Guide. It was designed to be a very basic training class for entry-level job skills. After getting significant feedback from those interested, we decided to make it a "work-at-your-own-pace" class. Students could log in at any time, 24/7, complete the coursework, and spend as much time as they needed on any topic in the class. This is ideal for those with work, family, and other commitments, and allowed those students the flexibility to further their knowledge without sacrificing other areas of their life. It seems time is the most significant factor in furthering our education.

The following topics were covered: Introduction to the Law Office; Duties of the Legal Secretary; Effective Telephone Skills; Effective Oral Communication Skills; Effective Written

Communication Skills; Calendaring and Timetables; Basic Grammar Skills; Transcription and Proofreading Techniques; Court Structure; Citations; Service of Legal Documents; Preparation of Documents Filed with the Court; and Basics of Civil Litigation. The cost of the training class was \$150 for LSI members and \$200 for non-LSI members. The cost included the Legal Secretaries Reference Guide. Without any marketing, we had 31 students enroll: 18 were members, and 13 were non-members. All were equally located throughout the state. I had two CCLSs, several with experience, and the rest at an entry level. Half were already working in offices, and the other half were not.

We received excellent feedback from the students. From the surveys I received, all said they loved the online format and chose online for the convenience, and the fact that there were not any face-to-face classes available in their area. They loved that they could log in any time and work their studying around children, work hours, and weekend commitments. A few would like more interaction between students, and I have plans to enhance that in our next class. Almost all felt the cost was reasonable. Many said they

would like to see the class offered for eight weeks, and felt six weeks was not enough time to get through all of the material. As for criticism, many said I talk too fast in the video lectures and they needed to view them a couple of times to get all of the material. I know I often rush through the material, but it is simply due to video file size and space limitations on the platform. Also, I did not provide page numbers in the book to coordinate with the online material. We hope to incorporate this as well. Previously, I was concerned about updates in the book and the tedious task of updating the online material to coordinate. However, I think it will be worth the work as it would definitely make it easier for the students.

While the class required my daily attention and monitoring, it was worth it. The students were very understanding and willing to work with me when technical issues came up. They all knew I had the same issues they did as far as work, family, and other commitments. Together, we resolved most issues quickly. Thanks to the input of the students, I have a list of minor improvements to make for the next class, and I already have a waiting list.

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ONLINE EDUCATION FOR LSI

Continued from page 10

The second session of our Beginning Legal Secretarial Training Class began March 31 and once again ran for six weeks. But wait, there's more! On April 14, another class started, entitled California State Court Discovery. This class was a four-week class which covered the various discovery methods, including interrogatories, demands for production, requests for admission, depositions, subpoenas, physical examinations, etc. The class was offered for \$30 for LSI members and \$50 for non-members.

More you ask? You got it! Since many of our members have never participated in an online education class, the CEC offered a free mini-class on how to create tables of authorities in Word. This class also began on April 14. While the content is only about 30 minutes, LSI members had four weeks to log in and review the material. This

at least gave everyone a chance to see what online education is all about. This is just the beginning in moving our organization into the future of technology.

For online education, you have to be disciplined and self-motivated. However, for those of us juggling work, families, hobbies/interests, and other commitments, it is a perfect way to sneak in our continuing education requirements when we can find a few minutes in our day. For some of us that is on our lunch hour at work, at 10 p.m. when the kids are asleep, or 5 a.m. before we jump on the freeways and fight the traffic. Whatever your obstacles are, hopefully this format of education will work for you.

At annual conference in May, I will once again have a demonstration of our online classes for those who attend the Legal Secretarial Training/Seminar

chairmen workshop. While LSI still encourages associations to host local training opportunities in their areas, we realize this may be difficult for some. Nevertheless, I will be providing information on how your association can put together legal training seminars on the local level.

The CEC will also be discussing future programs on the topics you have asked for. After all, the main purpose of our organization is "educating California's legal professionals." It has been a crazy year, but I am proud to say we finally did it. You asked us to rise to the challenge, and we did! I appreciate that President Sandra, and the rest of you, had the confidence in me to pull this off. I hope I didn't disappoint. Looking forward to seeing all of you in Concord!

LS

ADOPTION FROM A DAD'S PERSPECTIVE

Continued from page 9

drove back to the airport to meet our new daughter, the playmate from the video. She was not very happy with us that day, but quickly adapted to being the latest addition to our family.

So, if you have been keeping count, that's seven adoptions which makes a family total of thirteen kids. We never intended to raise a family of thirteen, but we never counted on adoption being so rewarding, fulfilling, and exciting.

Several years have passed since our last adoption. Through those years we have been very proud of our children at times, and very hurt at others. My wife's first adoption, the Korean/American boy, is now a high school teacher with a wife and two children. He is bright, fun, responsible, and a great dad. Our "club-footed" Indian boy enlisted in the Navy, volunteered for Iraq, and is now working for Lockheed Martin as an airplane corrosion specialist. He currently lives in Texas with his sweet wife and their two

children. Our two sisters from Korea are still difficult. The younger of the two has not yet been able to stop stealing. Within three months of turning 18 and moving out of our house, she was arrested and eventually convicted of grand theft. Most recently, we were contacted by Allstate Auto Insurance Investigators because she was suspected of stealing an \$180,000 Porsche. To our knowledge, she has not been arrested for the Porsche incident. The older of the two girls will not communicate with us. She appears to be, from what we have heard, doing well and living in the Bay Area. Our next little Indian baby is now 25 years old. He is married to a sweet girl and they are happily settling into life together. Finally, our two Down syndrome children are now 14 years old. By the way, they are 19 days apart. They are in the eighth grade, enrolled in a learning handicapped class. They are fun, charming, entertaining, and the light of our lives.

Adoption is a complex subject. It means so many different things to different people. The adoption process is highly regulated by law and rightly so. But looking beyond the law, for the birth parents who, for whatever reason, are not parenting, adoption can mean heartache and struggle over their loss. Adopted children are forced to deal with the loss of their original parents while prospering in the care of their new moms and dads. Finally, the adoptive parents often find great joy and a sense of accomplishment in providing love and stability to their adopted child. For me and my wife, adoption has given us immeasurable joy as we watch our children prosper. With our difficult girls, we take comfort in knowing that we provided for them and attempted to prepare them for adult life. As with all children, they grow into adulthood and choose their own lifestyles...some stay close to their childhood teaching and others venture off onto new paths.

LS

LEGAL SECRETARIES, INCORPORATED

Officers and Chairmen Workshops

May 16, 2014

Moderator: J. Cori Mandy, CCLS, Educational Program Coordinator

Schedule: 8:30 a.m. Introductions and Workshop Overview – **J. Cori Mandy, CCLS**
 Location: Golden Gate A
10:15 -10:30 a.m. Coffee Break

President's Roundtable (Incoming/Outgoing Presidents Only)		9:00 a.m. to 11:45 a.m.
Moderators: Mary S. Rocca, CCLS and Patricia E. Miller, PLS, CCLS		Location: Club Room 1
First Session – 9:00 a.m. – 10:15 a.m.		Second Session – 10:30 a.m. – 11:45 a.m.
<u>Legal Secretary Training/Seminars</u>		<u>Newcomer's Workshop/Corporate</u>
Moderator: Shaylene Cortez, CCLS Legal Secretary Training Chair		Moderator: Catherine Culver, CCLS LSI Administrator
Location: Baldwin		Location: Baldwin
<u>Career Promotion/Scholarship</u>		<u>Governor's Workshop</u>
Moderator: Sylvia Marsh Career Promotion/Scholarship Chair		Moderator: Jennifer L. Page, CCLS Executive Secretary
Location: Seminar 2		Location: Seminar 2
<u>Treasurer's Workshop</u>		<u>Ways and Means Workshop</u>
Moderator: Heather Edwards LSI Treasurer		Moderator: Linda Duarte LSI Executive Advisor
Location: Seminar 3		Location: Seminar 3
<u>CCLS Workshop</u>		<u>Hosting LSI Conference</u>
Moderator: Terrie Quinton, CCLS LSI CCLS Chair		Moderators: Diane Mecca – Governor-Stanislaus County LPA
Location: Chabot		Stephanie Harrison – Governor –Merced County LPA
		Rod Cardinale Jr. – President-Santa Clara LPA
		Location: Chabot
<u>Membership</u>		<u>Building Your Own Website</u>
Moderator: Mary J. Beaudrow, CCLS LSI Vice President		Moderator: Cathleen McGrath Siler Long Beach LPA Co-President
Location: Golden Gate C		Location: Golden Gate C

Please note: Locations are subject to change.

CCLS Quiz: Legal Terminology

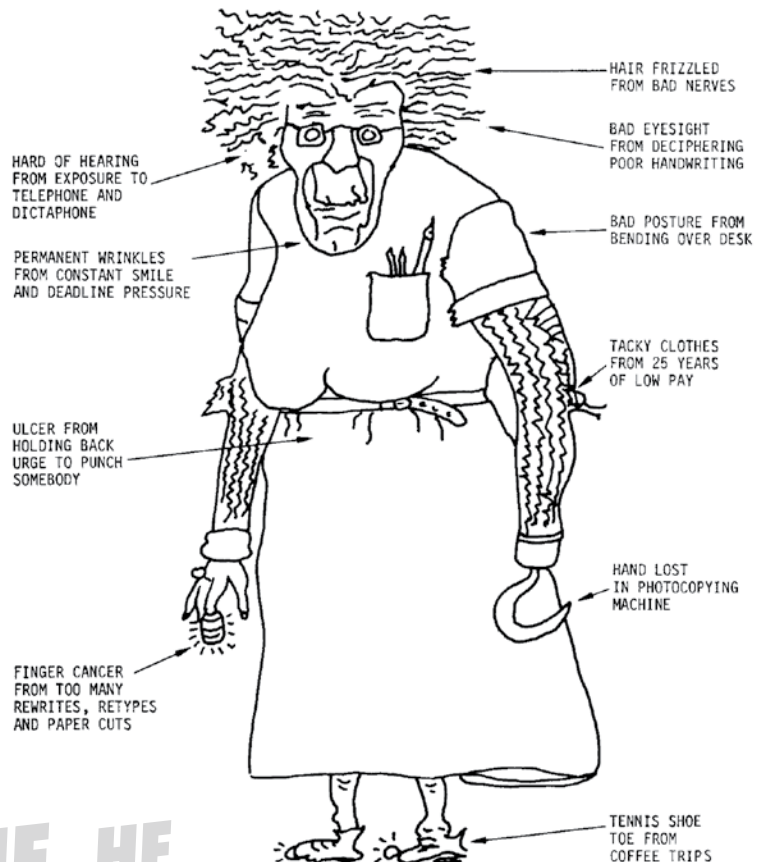
E	B	G	O	P	N	T	M	A	X	M	R	Q	U	O	B	E	Q	U	E	A	T	H	P	D	F	K	S
S	L	R	A	T	S	E	U	V	V	J	L	N	T	B	X	C	U	P	X	J	K	E	W	M	T	E	G
C	I	A	U	Y	T	P	O	N	O	F	J	O	K	L	E	P	T	O	P	R	L	B	X	E	M	J	Q
H	R	N	L	I	R	E	Y	N	I	N	H	I	G	Y	S	X	C	Z	U	Z	Z	A	J	I	G	I	C
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I	S	O	V	U	A	Q	D	C	W	R	I	T	O	F	M	A	N	D	A	M	U	S	X	R	D	E	Q
L	B	C	O	M	M	A	Q	R	E	T	R	O	P	E	R	I	N	R	O	F	I	L	A	C	W	Q	N

1. Unofficial reporter for the California Supreme Court
2. At the beginning or threshold
3. What for what; this for that; something for something
4. For a specific, limited purpose
5. Punctuation in series of citations within parentheses
6. Destruction of evidence
7. Undue lapse of time in enforcing a right of action
8. Bring with you
9. Code of Civil Procedure
10. Oral; not in writing
11. To dispose of personal property by will
12. To speak the truth
13. An order requiring the performance of an official duty
14. Completely remove certain evidence from record
15. In the same place
16. Now for then
17. One who dies without a valid will
18. Unqualified title to real property
19. Material part of a grievance
20. State's getting property because no owner can be found

SEE QUIZ ANSWERS ON PAGE 25

HA, HA, HA

SECRETARY BURNOUT



HE, HE



MARIA BISHOP, CCLS, is the Editor-in-Chief of LSI's Publications Revision Committee. Maria is a member of Mt. Diablo LPA and is currently serving as its Co-President and Treasurer. She has been employed as a legal secretary and paralegal since 1975, working for the same attorney, Richard Perez of Perez & Miller, for the past 36 years.



CRISTINA MORENO, has been a member of Mt. Diablo LPA since 2000 and is currently serving as its Governor. She has been with her current employer, Angius & Terry LLP in Walnut Creek, for 9 years, working in the area of construction defect and homeowner association law.

2014 LSI ANNUAL CONFERENCE

"A Musical Journey"

BY CO-CHAIRS, MARIA BISHOP, CCLS, AND CRISTINA MORENO

Mt. Diablo Legal Professionals Association is looking forward to hosting LSI's 80th Annual Conference at the Hilton Hotel in Concord, California, on May 15-18, 2014. The theme of our conference will be "A Musical Journey." The Hilton is located at 1970 Diamond Blvd, Concord, CA 94520, (925) 827-2000.

The scrip ticket price is \$130 (\$120 if payment received by April 15, 2014), which includes registration, Friday night Welcome Reception, Saturday evening banquet, and Sunday brunch. The conference room rates will be \$109++ single/double per night. Free parking is available to conference attendees, free Internet in guest rooms, and reduced Internet rates in conference rooms.

The theme of our conference is A Musical Journey. Our musical journey starts on Friday. We hope you'll attend one or two of the Officer/Chairmen workshops. Friday will also feature three luncheons— one for Governors, one for Presidents, and one for Newcomers—and Hawaiian music will be featured. Then later that day, get ready to kick up your heels and join us at the Welcome Reception for country music and some line dancing. Feel free to wear your cowgirl (or cowboy) hat and boots. On Saturday, plan on attending the Annual Meeting to find out what's been happening within our corporation. We also hope you'll join us at the CCLS/Membership Luncheon and

find out who our new CCLSs will be and listen to some rock and roll music. (Please note that the hotel restaurant will be closed for lunch on Saturday.) Saturday will culminate with a reception and banquet. Plan on wearing your finest outfit. We will dine listening to cool jazz music. We'll round out the weekend at Sunday brunch which will feature soothing classical music. Stay for LSI's Installation of Officers which will take place right after brunch.

We hope that you will plan on attending the Legal Specialization Section workshops on Friday and Saturday. The section leaders work hard to bring you interesting and relevant topics. Invite the attorneys in your office. It's an affordable way for them to earn MCLE credit.

Conference time is also networking time. Bring your business cards to drop off at the exhibitors' opportunity drawings, and don't forget your address labels to place on all the raffle tickets you'll be buying! We hope you'll visit each and every exhibitor and thank them for their participation.

The Concord Hotel is home to Plate & Vine, a moderately priced, California-style cuisine, restaurant which serves breakfast, lunch and dinner. They use locally-sourced foods, grown and raised just miles from their location. The Wine Bar features Napa & Sonoma Valley Wines. Seasonal patio seating is available. They are open every day of the week, however, they do not serve lunch on Saturday and Sunday. If you want to venture out, the Willows Shopping Center is right across the street, where you will find many restaurants such as Claim Jumper, Benihana, the Lazy Dog, and Fuddruckers, and lots of stores to shop in. There is even a Krispy Kreme Donut Shop with a drive-thru lane. There is also Sun Valley Mall just a couple of miles away with many restaurants to choose from as well as dozens of stores to shop in. Visit the hotel's website at <http://www.concordhilton.com> for more information about what the hotel offers and things to do in the area.

Continued on page 15

In case you want to come early or stay later, here are a few things you can enjoy doing in our beautiful area:

- Just down the street is the Buchanan Fields Golf Course – an executive 9-hole public golf course with 1,982 yards of golf and its own driving range. For more information and details, visit www.buchananfieldsgolfclub.com. A few more miles away is the Diablo Creek Golf Course, featuring an 18-hole public golf course with lighted driving range. For more information and details, visit <http://www.diablocreekgc.com>.
- If you're into gambling, a couple of miles away is the California Grand Casino which has endured a colorful history since 1854. The Casino offers the Concord visitor many upscale amenities, including a large gaming area, a full bar, and a restaurant called The Grand Cafe. Open 24 hours a day, the California Grand Casino offers "new player coupons," super cash jackpots, and no limit tournaments. Check out www.calgrandcasino.com for more information and details.
- If you're into water fun, Waterworld is just around the corner (you can see it from the east side of the hotel). Waterworld is located at 1950 Waterworld Pkwy., Concord, CA 94520, and is only a very short drive around the corner. You could even walk there. The park will be open on the weekend of our conference. Check out www.waterworld-california.com for more information.
- If you're into drinking wine, you don't have to go far to visit some beautiful wineries. Whether you drive to Napa or to Livermore, there are lots of places to visit and sample wines of all types. Visit (Livermore) www.lvwine.org and (Napa) www.napavalley.com/wineries for more information.
- And if performing arts is your interest, the Leshher Arts Center in Walnut Creek has three great performances the weekend of your

visit: XXCentric presented by the Smuin Ballet, The 25th Annual Putnam County Spelling Bee presented by the Center REPer-tory Company, and Connections presented by the Diablo Symphony Orchestra. Visit their website for more information, www.lesherartscenter.org.

The closest major airport is Oakland International which is approximately 30 miles away. Or if you fly into San Francisco, the hotel is approximately 40 miles. The hotel does not provide shuttle service from/to the airport, however, you can take Super Shuttle, Cab, or BART (to the Concord station). The hotel does provide shuttle service from/to the Concord BART station. You need to call the Hotel and arrange for that pickup.

Mt. Diablo Legal Professionals Association is planning a very special weekend for you, so save the date and join us for "A Musical Journey" at the Concord Hilton on May 15-18, 2014.

LS

"Old, Older, Oldest"

SUSAN SABIA (1981) DIANA ESTABROOK, PLS (1973) ISOBEL CLAYTON(1956)

Sonoma County LSA, at its March meeting, included a surprise birthday party for one of its three remaining charter members, Isobel Clayton. SCLSA was chartered in 1956 and until its 50th year, Isobel had not missed a meeting! Isobel has served LSI three times during the years: as Inter-Club Chair, Assistant Registrar and Registrar. Today, Isobel continues to serve SCLSA as its parliamentarian! Happy Birthday Isobel!



California Certified Legal Secretary

A Program of
Legal Secretaries, Incorporated



APPLICATION

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

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

(Select One)		(Select One)
<input type="checkbox"/> Northern California		<input type="checkbox"/> Saturday, October 18, 2014
<input type="checkbox"/> Southern California		<input type="checkbox"/> Saturday, March 21, 2015

Deadline: Application must be received 60 days prior to examination date. A late application may be accepted up to 30 days prior to the examination if submitted with a \$30 late fee, in addition to the fees listed below, if space is available. Deferral requests must be made no later than 2 weeks prior to the exam.

EXAMINATION FEES*			
	LSI MEMBERS**		Non-LSI MEMBERS
	Registration fee: \$ 25.00		Registration fee: \$ 75.00
	Examination fee: <u>\$ 100.00</u>		Examination fee: <u>\$ 100.00</u>
	Total \$125.00		Total \$175.00

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.

*** Include \$30 late fee if applicable.

Name: _____ Last 4 Digits of SSN: _____

Mailing Address: _____

City/State/Zip: _____

Day Phone: _____ Evening Phone: _____ Email: _____

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

Dates: _____ Position: _____

Employer: _____

Address: _____

Supervisor: _____ Phone: _____

Summary of Duties: _____

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

Signature of Applicant: _____ Date: _____

Rev. Mar. 2014

Quarterly Assignments

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

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

Dates to Remember in 2014

April 23, 2014	Administrative Professionals Day	May 26, 2014	Memorial Day
April 25, 2014	Deadline to respond to LSI Directives	June 15, 2014	Father's Day
April 20, 2014	Deadline for submission of Chapter Achievement Contest entry forms	July 4, 2014	Independence Day
May 8, 2014	Original Reports due to Corporate Office	August 15-17, 2014	LSI Quarterly Conference
May 11, 2014	Mother's Day		Embassy Suites
May 15-18, 2014	LSI 80th Annual Conference		Host Association: Sacramento LSA
	Concord Hilton		
	Host Association: Mt. Diablo LPA		

Helpful Websites

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

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

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

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

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

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

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

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

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

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

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

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

California Secretary of State
www.sos.ca.gov

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



HANNALORE DIETRICH, CCLS, is a Notary Public and member of the Santa Clara County Legal Professionals Association. She is also the former chair for the Sunnyvale Housing & Human Services Commission, and in her spare time volunteers at the San Jose Tech Museum and Friends of the Sunnyvale Library.

THE PERSONAL TOUCH

BY HANNALORE DIETRICH, CCLS

SUBMITTED BY SANTA CLARA COUNTY LPA

A couple of recent scenarios helped me decide to research the use of digital technologies: (1) I have seen co-workers who prefer to “speak” to each other by e-mail or instant messaging—verbal communications are almost non-existent. When co-workers use words that appear sharp or critical in e-mail messages, it is expected that those messages are to be easily forgiven or “wiped away” by the sender’s remarks that he/she was mistaken or is sorry for the earlier e-mail.

(2) A friend of mine told me that her daughter spent six months in Cambodia to set up a program for her university. The daughter had little internet or telephone access. When she returned to the university, her friends wanted to “hang out” one evening. When she arrived at the gathering place, all of her friends in the room were glued to their electronic devices. After a few minutes, and with little human-to-human verbal communication, aside from the audible “yes” or “no way” in the room, the girl left.

Legal offices have ramped up their digital technology use, but one thing remains constant—our clients, co-workers, and vendors. We must be diligent to maintain human-to-human contact with them in effective ways—the *personal touch*. The following research addresses primarily youth; however, it can easily be applicable to adults.

In the legal profession, new technologies like West-Law, LegalSolutions, online e-filing, and smart phones and tablets speed up the rate at which we are able to send and receive data. Smart phones, iPads, tablets, office machines, and the internet produce millions of communiqué every minute. Many recipients of today’s communication are human beings, so we need to think about the content shared and its impact on the receiver. Otherwise, meaning can be lost.

In *The Distraction Addition* (Pang, 2013), studies showed that monkeys’ and humans’ minds are very similar. Monkeys’ minds are constantly active and demonstrate restlessness. With the added sounds of electronics, beeps from new voicemail messages, flashing lights, and buzzing of text messages, monkeys’ minds are in a manic state, unable

to distinguish between choices or technologies. In contrast, Pang noted that Buddhist teachings require a person to use solitude and silence to quiet the mind. Catholics use monasteries for meditation to prepare the mind to receive God’s wisdom, because Catholics believe the busy mind cannot hear the divine (pp. 4-5).

Alex Pang (2013) continued regarding preferential use of technology:

For too long, we’ve left the chatting monkey in charge of our technologies, and then we wonder why things go bad . . . We want the same capability to use complicated technologies without thinking about them, without experiencing them as burdens and distractions. We want our technologies to extend our minds and augment our abilities, not break up our minds. (p. 7).

Mark Bauerlein (2008) writes in his book, *The Dumbest Generation*, that the youth of today are absorbed with digital tools and have more knowledge and information readily available. Yet, they are “no more learned or skillful than their predecessors . . . except in the materials of youth culture” (pp. 8-9). Young Americans are talented and enterprising, but are not into ideas, books, and civics. Technology has thrust them into a different realm and other consciousness (p. 10).

In *iDisorder* (2012), Dr. Larry Rosen reported of a 1995 cyberlife study regarding psychological health, which was conducted using 93 households. Dr. Robert Kraut, who

Continued on page 19

conducted the research, found that increased internet use did not create positive connectivity (pp. 21-22). Dr. Rosen continued, “greater use of the Internet is associated with increases in loneliness and symptoms of depression” (pp. 75-76). Symptoms of depression or mania can be played out through a person’s relationship with social media and technology (p. 76).

The National Institute of Mental Health (NIMH) reported a few symptoms of mania:

1. Feeling wired or jumpy, agitation, and irritable mood;
2. Talking very fast, racing thoughts, and jumping from idea to idea; and
3. Easily distracted. (Rosen, 2012, p. 77).

Additionally, Dr. Rosen (2012) found that some people experience social withdrawal with increased digital technology usage. One man, who was formerly a social person, became more withdrawn after using computers, the Internet, and video games. This man’s “computer was so enveloping he rarely ate, and after a few years, Alan could no longer tolerate going to the office. People became annoying to him” (p. 171). A few social withdrawal traits are: (1) social anxiety that does not abate, (2) indifferent to criticism or praise of others, and (3) suspicious thinking (p. 171).

John Palfrey and Urs Gasser (2008) in *Born Digital* classify the new digital generation as people who “live much of their lives online, without distinguishing between the online and offline” (p. 4). These digital natives have only one identity that merges their surreal with their personal lives; others are able to separate the two identities. Digital natives have common practices like the time spent using digital technologies, the ability to multitask, how they relate and express themselves by digital technologies, and how they create new art and new knowledge through digital technologies. For digital natives, “new digital technologies—computers, cell phones, Sidekicks—are primary mediators of human-to-human connections” (p. 4).

Digital natives have lots of friends, online and in the real space. Overnight, digital natives’ friends and connections grow. Yet, the nature of their friendships is changing: “They are often fleeting; they are easy to enter into and easy to leave, without so much as a goodbye; and they are perhaps enduring in ways we have yet to understand” (Palfrey and Gasser, 2008, p. 5).

With the diverse amount of information on the internet, the question of quality of information is posed. More is not always better. The digital generation may not question vast amounts of readily available information, as prior generations did. Because of the digital age, both digital natives

and the older generation will view information differently (Palfrey and Gasser, 2008, p. 164).

Palfrey and Gasser (2008) noted their concern for people who digitally skim information, as shown in the following e-mail message written by Urs to John (p. 275):

I worry too, about the gap in access, literacy, and participation. The digital “haves”—those who are both born digital and who have the opportunities and skills to make use of the technologies—need to realize that there are digital “have-nots” in every culture, and it matters. Whether for self-interested reasons or altruistic motives, Digital Natives ought to work to bridge the access, literacy, and participation divides that bedevil societies. If left alone, these digital gaps will cause other unhealthy gaps in society to widen (p. 279).

In the book *Talking Back to Facebook*, James P. Steyer (2012) stated that youth and adults use social networks differently. How the youth use social networks can be unhealthy or even hurtful. They use social networks for social interaction as opposed to human-to-human interaction. Youth even text more, as it is quick and efficient, without regard to the emotional nuances of voice tone and facial expressions. Without critical thinking, “. . . these new forms of electronic communication can also be cruel and damaging, and anonymous online communities can instantly amplify the impact of pain and bullying, gossip, and social exclusion” (p. 5).

Steyer (2012) stated that “more than 5 billion people own cell phones” (p. 7), and youth average 3,339 text messages each month. In addition, youth use their phones to listen to music, take and share photos, and access the internet. This surreal world is shaping their universe, interests, behaviors, and values (p. 7).

According to Steyer (2012), “kids are now spending far more time with the media and technology than they are with their families or in school” (p. 7). Youth and adults should reflect on how the digital world impacts their emotional and social health, their concepts of reality, and their standards (p. 7). In other words, “technology is becoming the architect of a new intimacy” (p. 9).

Walking down the street on any given day, it is common to see people with their eyes glued to their smart phones, tablets, or laptop computers. Steyer (2012) stated that when people are “focused on a device or computer screen for seemingly hours on end, people can ignore meaningful personal connections and emotional cases” (p. 9).

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Child development experts believe the following:

... digital media affects our ability to give full, undistracted attention to each other and our own thoughts. The lack of disconnected downtime in our tech-dominated lives is disrupting our ties to each other and adding significant emotional stress to the lives of millions of kids and adults. (Steyer, 2012, p. 9)

Additional issues that may result from constant digital technology use are: (1) attention/addiction, (2) privacy, and (3) perils and possibilities (Steyer, 2012, pp. 9, 11-15).

One relationship side effect of digital technology is distraction. i-Distracted is its own culture. Steyer (2012) commented that i-Distracted can be rude and ignores basic social courtesies. In addition, i-Distracted can erode the quality of interpersonal relationships with family, friends, and co-workers. The more time a person spends on technology, the less time that person can spend in meaningful human relationships (pp. 21-22).

People know how much we care about them by the attention we give. If we do not pay attention to people, we are sending the opposite message. Stanford Professor Clifford Nass told a story of two undergraduate students. One distressed girl tried communicating her thoughts and feelings to a friend. This friend had her laptop open and was glancing at it frequently. Professor Nass believed this digital distraction reduces a person's ability to show empathy and compassion. If a person is not an attentive listener, he or she may miss subtle emotional nuances, and the responses may be shallower because of not being fully engaged (Steyer, 2012, p. 22).

Further studies show that without facial expressions or tonal voice, it is difficult to fully understand text or digital messages. While texting may be quick and easy, studies

indicate that young people feel greater insecurity and social anxiety in the virtual world, where postings and texting are used as the basis for breakups, jealousy, anger, and confessions (Steyer, 2012, p. 23).

Some experts believe that young people are becoming more impulse-driven and self-centered in the "me" world of social media. Elias Aboujaoude, a Stanford Medical School psychologist, stated that online behavior and personality formation are crossing over into the offline lives of youth. Aboujaoude commented: "We are more impatient, more narcissistic, more regressed even when there is no browser in sight" (Steyer, 2012, p. 26).

Digital technology is all around us. It advances our professional and personal lives. The question remains: How much focus will we give to digital technology vs. human relationships? In the legal industry, it is very important to maintain positive human-to-human relationships with clients, co-workers, and vendors, also known as *the personal touch*.

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DON LEE

Continued from page 7

After two years, Don was approached by his mentor Lloyd "Spike" Dethlefsen, CSR #2. That's right, license number 2! Spike persuaded Don to go to Merced and to eventually take over his business, which he did, and he has never regretted that decision. While working in the deposition business, Don was also the official reporter for Mariposa County, the oldest and still working courthouse (built in 1854). He also covered all the justice courts in Merced which numbered approximately six, and he also took depositions from Stockton to Fresno; that's when gas was cheap.

In the 1970s, Don's boss Spike introduced him to the Merced-Mariposa Legal Secretaries Association and its members and attended a couple of evening meetings. The legal secretaries from Mariposa and outlying areas had to travel an

hour to get to the meetings in Merced. As he attended more meetings, he became more involved and was eventually its President back in the 70's, the same year as Patricia Parson.

Don said that he has been really lucky and blessed to continue to meet interesting people, even since my retirement in 2007, because he has continued to volunteer full time at Merced Senior Center from October 2012, to January 2014, and he's heard countless stories of real live adventures of people growing up in America or emigrating here and helping to build this country and state. And the stories he remembers? Only one, the day he was made an Honorary Member of Legal Secretaries, Inc., November 12, 2011.

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LEGAL SPECIALIZATION SECTION SEMINARS
LSI Annual Conference – May 15-18, 2014 – Concord Hilton
Hosting Association: Mt. Diablo LPA



REGISTRATION FORM - DEADLINE IS Monday, May 5, 2014

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

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

LSI SECTION MEMBER: Free with Advanced Reservations \$5.00 at the Door/After Deadline Handout Only: \$5.00	LSI NON-SECTION MEMBER: \$10.00 with Advanced Reservation \$15.00 at the Door/After Deadline Handout Only: \$10.00	NON-LSI MEMBER: \$15.00 with Advanced Reservation \$20.00 at the Door/After Deadline Handout Only: \$15.00
Friday, May 16, 2014 – 1:30 to 3:30 p.m.		
<u>CRIMINAL LAW:</u> Topic: "Immigration Consequences of a Criminal Conviction; What's Important to Know About Clients and Their Stories" Speaker: Daniel L. Barton of Nolan, Armstrong & Barton and Zachary M. Nightingale of Van Der Hout, Brigagliano & Nightingale. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>FAMILY LAW:</u> Topic: "Collaborative Divorce – Meet the Team" Speaker: Emily DeFalla, Esq. and a Mental Health Professional <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Friday, May 16, 2014 – 4:00 to 6:00 p.m.		
<u>CIVIL LITIGATION:</u> Topic: "Racing Against Time - Discovery and Motion Calendar Procedures for Superior Court Cases" Speaker: Brenda Thomas Wilson, J.D. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>TRANSACTIONAL LAW:</u> Topic: "Limited Liability Company vs. Incorporation" Speaker: TBA <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	
Saturday, May 17, 2014 – 4:00 to 6:00 p.m.		
<u>LAW OFFICE ADMINISTRATION:</u> Topic: "Employment Law Updates – 2014" Speaker: Jeanine DeBacker, Esq. <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	<u>PROBATE/ESTATE PLANNING:</u> Topic: "Conservatorships - Serving Clients and Collecting Fees" Speaker: Scott Poling, Esq.; Pat McVey-Ritsick, CLPF, NCG, Licensed Fiduciary; and Kristi L. Edwards, CCLS, Probate Paralegal <input type="checkbox"/> I will attend <input type="checkbox"/> Handout Only <input type="checkbox"/> Section Member <input type="checkbox"/> Non-Section Member <input type="checkbox"/> Non-LSI Member	

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

PLEASE MAKE ALL CHECKS PAYABLE TO "LSI"

Speakers and Topics are Subject to Change

PER LSI STANDING RULES, CHECKS ISSUED TO LSI WHICH ARE NON-NEGOTIABLE BECAUSE OF INSUFFICIENT FUNDS OR OTHER REASON SHALL BE REPLACED IMMEDIATELY BY CASH, A CERTIFIED CHECK OR MONEY ORDER FOR THE AMOUNT OF THE ORIGINAL CHECK, PLUS \$25 PENALTY, PLUS THE ACTUAL COST CHARGED LSI BY THE FINANCIAL INSTITUTION FOR PROCESSING THE ORIGINAL CHECK.

The Legal Specialization Sections are a program of Legal Secretaries, Incorporated, an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.75 hours each, by the State Bar of California.

2013-2014 Legal Specialization Section Leaders:

Civil Litigation: Dawn R. Forgeur, CCLS drforgeur@stoel.com	Law Office Administration: Tammy L. Hunt, CCLS loaleader@tlhunt.org
Criminal Law: Jill Gardella jgardella@nablaw.com	Probate/Estate Planning: Kristi L. Edwards, CCLS kledwards@justice.com
Family Law: Mary Lou Floyd, CCLS, M.S. Louloux7@yahoo.com	Transactional Law: Lisa De La O ldelao@fitcheven.com



ELISE DRESSER, CCLS, is currently serving as Governor for Santa Clara County LPA. Elise earned her CCLS in 2009 and is currently a member of the CCLS Certifying Board. Elise is also a board member of the Bay Area Legal Forum (BALF). Elise has been a civil litigation secretary at Newton Rimmel in Mountain View for over 20 years and can be reached at edresser@newton-remmel.com.

RECERTIFICATION: Frequently Asked Questions

BY ELISE DRESSER, CCLS, SUBMITTED BY CCLS CERTIFYING BOARD

Congratulations to all the examinees who studied for and passed the California Certified Legal Secretary (CCLS) exam this year! If you are a new CCLS, or if you simply need a refresher course about recertification, here are some of the most frequently asked questions about recertifying. If your question is not answered below or you need further information on any subject, refer to the *Standards for Recertification*, which can be found on LSI's website, or contact the CCLS Certifying Board at cclscertifyingboard@gmail.com.

When do I have to renew?

Certification is for a three-year period which terminates on the date indicated on your notice of certification or recertification.

How many credit hours do I need?

You must complete 15 credit hours of approved continuing education during each recertification term. It is your responsibility to complete a Certificate of Attendance and submit it to the sponsor of the educational program for signature verifying your attendance at the program. For each hour of instruction received at an educational program approved by the CCLS Certifying Board, you will receive 1 credit hour. Educational courses more than 1 hour in duration shall qualify for matching credit hours. Pursuant to the *Standards for Recertification*, of the required 15 credit hours, no more than 6 credit hours will be allowed for education regarding administrative and/or mechanical function as performed by legal support staff, and of those 6 hours, no more than 2 credit hours will be allowed for educational courses where the topics are not unique to work done by legal support staff. For specific information concerning qualifying credit hours, please refer to the *Standards for Recertification*.

What types of programs are acceptable for CCLS credit?

Approved providers are those providers which sponsor educational programs that may qualify for recertification credit. Not all educational programs sponsored by a

particular approved provider will qualify for recertification credit, so if you have a question regarding a particular program, refer to the *Standards for Recertification* or contact the Certifying Board Chair or Recertification Chair for clarification. Approved provider status has been granted for the following educational programs:

Seminars and workshops (including online seminars, workshops, or study group sessions) sponsored by LSI, its affiliated associations, and its Legal Specialization Sections.

Seminars and workshops sponsored by The State Bar of California, its legal specialization sections, and any bar association in California.

Course and educational programs granted MCLE status by The State Bar of California.

Courses and educational programs approved for Professional Legal Secretary (PLS) continuing education credit by NALS.

Other educational programs offered by organizations to which approved provider status has been granted by the CCLS Certifying Board.

Do webinars and online study groups qualify for CCLS credit?

This question has been asked many times recently, especially now that LSI has been offering more and more online webinars and online programs, such as Legal Secretarial

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RECERTIFICATION

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Training and CCLS study groups. Certification credit may be obtained through self-study by listening to or watching videotaped legal education courses approved by The State Bar of California for MCLE credit, including those sponsored by LSI and/or its affiliated member associations. Such credit hours shall not exceed 5 credit hours in any recertification period. A Certificate of Attendance is required and is to be signed by the provider or your supervising attorney. If a Certificate of Attendance is not offered by the provider, you may obtain one on LSI's website.

CCLS recertification credit may be obtained by participating in a CCLS study group sponsored by LSI and/or its affiliated member associations. Credit hours for such study groups shall not exceed 10 credit hours (exclusive of independent study time) in any recertification period. Live participation shall be confirmed by the instructor. A certificate of participation completed by the study group instructor must be provided in order to claim credit hours.

CCLS recertification credit may be obtained by attending or participating in a webinar approved by The State Bar of California for MCLE credit, or any online workshop or seminar sponsored by LSI and/or its affiliated member associations. A certificate of completion is required to receive credit hours and is to be signed by the provider or your supervising attorney. Certain LSI-sponsored online workshops, seminars, and study groups may or may not qualify for MCLE credit and, if necessary, will be considered by the CCLS Certifying Board on a case-by-case basis.

Do I need to keep the program handouts?

Yes. Pursuant to the *Standards for Recertification*, in order to qualify for recertification credit, any program, course of study, or class of more than one hour must have a substantive handout. The Recertification Chair will most likely not request a copy of the handout if the program is at least one hour in duration and the title of the program is clear as to the subject matter. However, if the title of the program is questionable and is over several hours in duration, you may be asked to provide a copy of the handout.

I have my 15 credit hours. How do I renew my certification?

Submit an Application for Recertification on or before the date your certification term expires, along with your original Certificates of Attendance and the requisite \$25 recertification fee, to the CCLS Certifying Board Recertification Chair, whose address can be found on the Application for Recertification. Credit hours in excess of 15 hours per certification term shall not be applied to a subsequent certification term.

Do I need to advise the Certifying Board if I move, leave the legal field, or retire?

Yes! If your address changes, be it your email address, work address, or residence address, you need to notify the CCLS Certifying Board. While it is your responsibility to recertify before your recertification term expires, the Recertification Chair will send out reminders approximately 60 days before the Application for Recertification is due. If your contact information has changed during the preceding three years, the CCLS Certifying Board may not be able to find you!

If you move out of state, notify the CCLS Certifying Board so that a hold can be placed on your continuing education requirements. You cannot use the CCLS designation while you are out of state and not maintaining your educational requirements. If you return to California, you must notify the CCLS Certifying Board within 60 days of your return and then continue with your continuing education requirements.

If you leave the legal field, contact the CCLS Certifying Board so that your status can be changed to inactive and a hold put on your continuing education requirements. You will not be able to use your CCLS designation during this time. If you return to the legal field, you must notify the CCLS Certifying Board immediately and continue on with your educational requirements.

If you have retired from the legal secretarial profession, you must notify the CCLS Certifying Board. Upon retirement, you no longer need to obtain continuing educational credit, however, you may still continue to use the CCLS designation. If you return to work in the legal field and wish to reactivate your CCLS status, you must notify the CCLS Certifying Board and continue with your educational requirements.

Final Checklist

You're almost there! Your recertification packet should include: (1) Completed Application for Recertification (with current contact information); (2) check payable to "LSI" in the amount of \$25; (3) your original, signed Certificates of Attendance; and (4) a copy of any program handout, if applicable or requested, for any program over an hour in duration. You will receive confirmation of your recertification from the Recertification Chair.

If you follow these procedures, processing your recertification will go much smoother and you will be recertified for another three years. Again, if you have additional questions, please contact the CCLS Certifying Board or refer to the *Standards for Recertification* at www.lsi.org.



JAN KUYKENDALL, CCLS, is the current President of Stockton-San Joaquin County LPA. She has been a member of LSI since 1985, and employed as a legal secretary since 1981. She has held a chairmanship every year of her membership, and has held all elected officer positions (most of them more than once). She has been working with her current employer, Christopher A. Lee, since 1998.

What's In It For Me?

BY JAN KUYKENDALL, CCLS, SUBMITTED BY STOCKTON-SAN JOAQUIN COUNTY LPA

When a person joins an organization such as a local association, and through that affiliation, LSI, what is it that person is expecting to gain?

Certainly, it is reasonable to expect that you will gain knowledge through continuing legal education, since that is LSI's primary goal, and that is easily obtainable through the Legal Specialization Section memberships, seminars, newsletters, etc., and through attending local associations' seminars and meetings, either your own or neighboring associations.

It is also reasonable to expect to cultivate and maintain an invaluable network of fellow legal professionals whom you can call upon when you are filing in an unfamiliar county, dealing with an area of the law you do not normally work in, or just when you need advice or counsel from a fellow professional. And it is reasonable to expect that you will gain self-satisfaction and self-worth in knowing that you are helping an organization that you care about reach its goals and be successful.

I joined my local association, and LSI, almost 30 years ago. My professional and personal life has been forever enriched by the friends and knowledge I have gained through that act of joining. Getting involved with my local association and LSI has given me self-confidence and, I believe, has enhanced not only my chosen career, but my personal life as well. My mentor, Frieda Marie Stewart, not only sponsored me into the association, but got me involved on the local level immediately, asking me to serve as one of her chairs! I have been actively involved ever since, and whatever I "volunteer" and put into the association has come back to me 100-fold or more. The women of this organization have never failed to encourage, compliment, and congratulate me when I succeeded, and commiserated and comforted me when I have failed or have gone through personal traumas.



In addition, my boss, with whom I have worked for over 15 years, has never failed to support me in my efforts to serve the association, by giving me time off (with pay) to attend conferences, monthly meetings (board and general), letting me use office time to make phone calls, answer and send emails, faxes, letters, and deal with whatever needed to be dealt with, without a cross word.

So, do I have the right to expect more from the organization, in the form of personal gain? I think not. But I have been troubled in the past several years that others do not share this opinion. So, who is right? Do long-standing members deserve to be honored for their past years of service to their local associations and LSI? Certainly, and each and every current member should go out of their way to thank them and let them know how much they are appreciated. However, I do not believe that they, or anyone, should **expect** to receive any sort of compensation (waiving of paying dues, etc., which could put the Association in jeopardy of losing its non-profit status. And these days, we have to be very careful of that.

Recent events have arisen which make it clear that we must research past practices in several areas that were previously taken for granted (Active Life Memberships, Golden Girl Memberships, to name two) to make sure that we can withstand any light of scrutiny which might be shined upon us. If it is found that we may have been

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WHAT'S IN IT FOR ME?

Continued from page 24

inadvertently violating one or more of these regulations, then we may have a case of "We gave this honor to you but now we have to take it away" because the suggested broadening of the criteria for those categories by members looking to benefit themselves brought to light the possible inadvertent violation of giving a benefit to certain members but not to others.

After all, the categories listed previously were not open to all members (at least not until they either were over 62 or they had given decades of service to the association, in most of the cases 50+ years). It was brought up and discussed extensively at one of our general meetings. We realize now that we may have to completely review and revamp our bylaws in a way that may affect our members, most notably our "Golden Girls" and our "Active Life Members."

Over the years I have expended hours, days, weeks, months of my time on association activities, fundraisers, board and general meetings, etc., as well as personal funds for things which I was not reimbursed for, nor did I ask or expect to be reimbursed for, and I continue to do so, with NO expectation of compensation. But, if you value the association and your membership therein, it's just something you do. The things I do, I do because I love this association and the people involved in it, and I want to see it and them thrive! Over the years, I have received so much more back in friendships, contacts, and helping the association to continue and to succeed!

And haven't we all been in at least one situation (between jobs, financial overload, SOMETHING) over the years where paying for our dues, our section memberships, going to a conference or even paying for the monthly dinner meeting (although you don't have to eat; in our association you are welcome to attend only) is difficult, if not next

to impossible? I know I have. But it, to me, is a matter of priorities. Is your membership in the association valuable enough so that maybe you sacrifice somewhere else so that your dues can be paid and you can continue to be a valuable part of this NON-PROFIT association? If yes, then you do; if not, then you let the membership lapse.

This is how I look at it. Non-profit is self-explanatory. Self-gain should have NO part of the equation FOR ANY REASON! The feeling you get from people within the association appreciating the things you do for the association more than makes up for any personal gain anyone may feel they are entitled to, or at least it should.

So, the next time you ask "What's in it for ME?", I think the answer, for me at least, is "I get the satisfaction of knowing that I am helping an organization that I care deeply about achieve its goals, be successful, and thrive." If it's not your answer, then....

Finally, I need to emphasize that the opinions stated herein are MINE and MINE alone. I do not presume to speak for the board, membership, or any other individual in the association, and the opinions stated should not be construed to do so. I guess I just needed to vent!

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QUIZ ANSWER KEY FROM PAGE 13

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PAUL C. LO, ESQ.

BY MICHELLE D. TICE, CCLS, LSI EDITOR OF THE LEGAL SECRETARY

At the February quarterly conference in Modesto, Paul C. Lo, Esq., was our Sunday morning inspirational speaker. So many of our members were mesmerized by Mr. Lo's speech that I thought I would reprint in our magazine.



Mr. Lo received his bachelor's degree in economics from the University of California at Davis in 1991 and his Juris Doctorate from UCLA School of Law in 1994. Paul was admitted to the California State Bar in December 1994. He is a former partner and managing partner of the Law Firm of Allen, Polgar, Proietti & Fagalde, and has practiced law for the last nineteen years in the Central Valley. Paul is the owner of the Law Offices of Paul C. Lo and practices in the areas of personal injury, employment law, business transaction and litigation, and general civil litigation. He is a former elected member of the Merced City School District Board of Trustees, a member of the UC Merced Foundation of Trustees, the founder and former president of the Southeast Asian-American Professionals Association (SEA-APA), and the former president of Hmong National Development, Inc. based in D.C. Paul was recently appointed by Governor Brown to the Merced County Superior Court, becoming the first Hmong-American Judge in the Country.

I have been practicing for 19 years, 2 months, and 23 days and counting until April 18, 2014, when I will be sworn in as judge. All of you are welcome, by the way, to come join.

In all these years, the one element that had made my life as an attorney easier, bearable, and orderly was the legal assistant, the paralegal, the clerk ... you do so many and bear so many, including insults, outrage, and criticisms from clients. When Gina said Don wanted me to come speak, I said absolutely, because I want to thank you for all that you do. So thank you.

Don wanted me to share a little of my life journey with you. I am more than happy to do so.

Last weekend, I just celebrated my 46th birthday on Feb. 15. Funny thing is, that was not really my birthdate ... the actual date is unknown.

I was born in the jungles of Laos in the middle of the Vietnam War in 1968. There was no hospital, no doctors, and no medicines, and certainly no birth certificates.

When I was five, I was sent to the city to attend school. Two years later, my family followed the kids to the city and left the mountains of Laos, a way of life they've known for hundreds of years. They took all the money they had and bought a farm near where I went to school. They had

cleared the land, planted the seeds, and built the barns.

Before we had our first harvest, in April 1975, overnight, we had to leave. Laos had fallen to the Communist: if we stayed behind, we surely would be killed.

At the beginning of the Vietnam War, the U.S. needed people to retrieve U.S. pilots shot down in the jungles of Laos and to stop North Vietnamese soldiers from crossing over to Laos along the HoChi Ming Trail to transport supplies and ammunitions to South Vietnam. To these ends, CIA advisors were dispatched to Laos to recruit, train, and arm a secret guerilla army of Hmong soldiers. My father and many relatives were among them. At its peak, the "secret" Hmong army came to number more than 30,000, the biggest CIA operation in the world.

The conflict in Laos was known to Americans as the quiet war—as opposed to the noisy one in Vietnam which flashed before American television sets nightly. To us, the war was anything but quiet. More than two million tons of bombs were dropped on Laos, mostly from American air attacks on communist forces. An average of one bomb was dropped in Laos every eight minutes for nine straight years. Between 1968 and 1972, the tonnage of bombs dropped on

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the Plain of Jars alone exceeded the tonnage dropped by American planes both in Europe and the Pacific during WWII. An estimated 40,000 of the Hmong people died as a result of the conflict.

My family had no time to think things over, to gather our belongings, to sell the houses and the lands. Overnight, we gathered as much as we could carry. What we could not carry on our backs, we simply left them behind. We closed the door to our newly built home in the city; my parents left their farm with crops still growing.

Our immediate and extended families began a treacherous journey on foot through the jungles of Laos for nine straight days to Thailand. We arrived to join tens of thousands of Hmong people who also fled from different parts of Laos to be cramped into an impoverished Thai refugee camp.

For the next five years, that refugee camp would be a place for me to grow up. I remember running up and down those dirt roads in the refugee camp, playing with other Hmong refugee kids. I remember food was scarce ... we would hunt mice for food. That seems disgusting now, but it was normal to me as a refugee kid. The Thai guards were cruel and merciless. Women were raped; refugees were beaten and killed without cause and without legal recourse. As refugees, we had no rights.

In 1979, our family was accepted to the U.S. I was 11 then. We first settled in Denver. You'd think the refugee camp in Thailand was shocking, but nothing compared to the shock of seeing snow for the first time.

But the real shock was that as refugees, we were unprepared emotionally, psychologically, and skill-wise for a new country, a new language and culture of which we knew very little about. Already 11 years old, I started school in the 5th grade, not knowing a word of English. While the other students studied their regular curriculum, I was placed in the corner of the classroom with coloring books reserved for pre-schoolers. I felt inadequate, ashamed, and out of place. I longed for the day when I would be a "regular" student in a "regular" curriculum.

I was determined not to go through that experience very long. With hard work and the support of many wonderful teachers, I quickly caught up, graduated from High School with top honors, went on to college and law school.

Let me conclude by sharing with you three observations made through my life journey:

First, in America, it has been true for many generations and still holds true today, that it doesn't matter much where you came from or your starting place in life, so long as you are willing to work hard and to dedicate yourself to something, particularly the pursuit of higher education, opportunities will open up for you.



Second, learn to embrace challenge; never run from a task or an opportunity simply because it is difficult. Through challenges and difficulties overcome, you will find your true calling and your passion in life.

Finally, when you have a dream, are willing to work hard toward it, and you don't quit and aren't bitter about all the things that seem to befall you unfairly, good and generous people are willing to support you, to lift you, to mentor you, and to go out of their way to help you reach your dream. It's tempting to think that our success is due to our intellect, our great ability, our hard work alone. It is not ... we have to acknowledge the people who were there in big and small ways for us ...

I remember my first teacher in this country ... she would frequently pinch my puffy cheeks and tell me everything will be OK. I remember my history high school teacher, who told me that I should be a lawyer so I could help the Hmong community. I remember my economics professor, who wrote my letter of recommendation to law school. He said more than ability or intellect, my compassion for the poor and disadvantaged is THE character trait that would make me a great lawyer.

Through the judicial application process, so many people said yes, I'll write a letter of recommendation for you, I'll talk to the decision makers for you, I'll help you on where ever you need help.

Finally, I must acknowledge the sacrifice of my parents and the Hmong people. Without their tears, their bloodshed, and the loss of everything that we ever owned and had, I would not be in America.

My father once told me that in all these years of being in this country, whenever he dreams in his sleep, he's always dreamed of places or of old friends in his home country of Laos. He reasons that his body may be here, but his spirit had not followed him. This is telling of the unfathomable sacrifices that parents make for their children.

THANK YOU for having me. God Bless you and thank you again for all you do to support us.

LS



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NO REFUNDS AFTER AUGUST 1, 2014





KERRY SPENCE, who has a private practice in Marin County, has been a paralegal for more than 36 years, and is the daughter of renowned trial attorney, Gerry Spence. Kerry provides legal documents to the consumer through People's Legal Docs, and to attorneys through the Paralegal Offices of Kerry Spence. She also mentors paralegals and LDAs about how to successfully operate a freelance and/or LDA business through Spence Consulting (in California, by statute, a paralegal works directly under attorney supervision and an LDA works directly for the public consumer). On her blog, *Paralegal World – Kerry Spence's Notes from the Trenches*, she shares her paralegal business philosophy and stories from her practice.

Kerry Spence, a Pioneer and Leader in the Paralegal Field

SUBMITTED BY KRISTI L. EDWARDS, MARIN COUNTY LPA

First of all, thank you for taking time to talk with us, Kerry. Could you please tell us about your background?

I was raised in the law. As a very small child, my father, attorney Gerry Spence, took me to court. I remember sitting on the big polished wood benches and watching my father in court. I was about eight years old.

There is a social justice advocacy need that runs in my family's blood, a need to help the people. My social justice advocacy contribution is to help facilitate a more compassionate and efficient legal system through promotion of paralegals working directly with consumers to access the legal system. Today's need for access to the legal system in a cost-effective way is at an all-time high. In California, recent testimony to the California State Bar indicates that, in Family Law alone, 80% of the parties are self-represented at the time of the filing of the first paper, and up to 90% by the time of completion of a divorce. Those numbers indicate that the need is no longer that of the low income legal consumer, but has risen to the middle class.

Much of the cost of doing legal work is the preparation of the legal documents, something paralegals are trained to do for attorneys. A trained paralegal can transfer that same knowledge to working with the consumer preparing legal documents. If the need for legal advice arises, the consumer can hire an attorney as a consultant on an hourly basis and the paralegal can prepare the attorney ahead of time, under the paralegal's lower rate.

I attended the University of Wyoming, the same school my father attended, where he graduated with a law degree and was valedictorian of his law school. I received my American Bar Association (ABA) paralegal certificate in 1977 from the University of San Diego's graduate program.



It was one of five schools in the country offering this new career training. That makes me one of the first paralegals on the planet (laughing).

I have been a paralegal for over 36 years. That's over half my life.

I started working as a paralegal at my father's firm in Wyoming, Spence, Moriarity and Schuster. In the beginning, no one really knew how to utilize a paralegal, and so I was put to work on investigating potential cases.

I worked with other notable trial attorneys, specializing in medical malpractice for the plaintiff. I soon went into private practice as a freelance paralegal, where I worked in complex litigation and trial assistance for 20 years.

Continued on page 31

During my years as a freelance paralegal, I saw the need for simple legal documents for the public consumer that could not afford an attorney. As a result, I added a legal document preparation section to my business.

You are the daughter of well-known trial attorney, Gerry Spence. What lessons from your father have most helped you in your career?

My father is literally a world-class lawyer. He has never lost a jury case in 60 years of practice, and he has won more multi-million dollar verdicts than any attorney in the history of the United States. He is the author of 17 books, including *OJ, The Last Word*, the true story of what he saw when he was the NBC consultant for the OJ trial. He made significant new case law in the Karen Silkwood case. This is case law that is now taught in law schools. He has defended the “poor, the injured, the forgotten, the voiceless, the defenseless and the damned” from corporate and government oppression. He founded and teaches at a trial lawyer college for plaintiff attorneys and public defenders (no insurance defense or prosecutors allowed).

You can just imagine what it was like to grow up in that household!

The most important thing my father told me was to trust in myself and find my own path. He also taught me to:

- Stand up for truth
- Fight for the underdog
- Do whatever is necessary to get the job done right
- Get up early
- Believe in myself
- Smile

With my father’s resources and reputation, I realized I could go to any law school I wanted, but I didn’t want to spend my life competing with my father. I needed to find my own path.

There was a new development in our legal system – an emerging second tier that was developing out of a need of the people who could not afford attorneys. I was raised to believe in legal justice for all, and I saw that that was not the reality. I saw that my paralegal training could be used to help people access the legal system in a cost-effective and super simple way by utilizing the paralegal to prepare documents and the attorney consultant to provide legal advice and strategy. I also thought it would be cool to be at the beginning of a profession that was just starting.

In 1977, the paralegal profession was just starting, with only five schools in the country. Ten years later it was the fastest growing profession in the United States. The next 25 years has seen the emergence of a new tier in the legal

system – a natural development of a young legal system. There are traditional examples of older legal systems that have evolved into two tiers – Great Britain with the *bar-rister* and *solicitor*, Central America with the *abogado* and *notorio*, and South America with the *abogado* and *escribano*.

You have established a successful practice, delivered keynote speeches, and are widely known as being a leader in the field. What advice would you give to paralegals that will soon be starting their careers?

I remember beginning as a paralegal. The beginning was so hard. I went to an employment agency and told them I was a paralegal. The woman said, “What is that?”

I would say to paralegals that are just beginning their careers:

You will be afraid of everything. You will be afraid that you will say something stupid. You will be afraid that what you read in that researched case does not really say what you think it says, or has the implication you think it has. You will be afraid of attorneys and their power. You will not have a clue on how to handle a project. You will sometimes feel inadequate, like having to answer that question again, “why didn’t you go all the way and become an attorney?”

The way to address that fear is to:

1. Remember who you are
2. Reduce it to simple.
3. Trust your intuition and training.

1) Remember who you are: Remember that you are a paralegal, a completely different creature than an attorney. A paralegal is trained in adjective law (procedural law and a little substantive law), while an attorney is taught in substantive law (applying the law to a specific set of facts and coming up with a conclusion). The paralegal is a procedural creature and the attorney is an advice creature.

Paralegals were trained to help attorneys help their clients and thereby reduce the legal fees. Your contribution is to provide procedural context so the attorney can do what she/he is trained to do (legal advice and strategy), and at the same time reduce the legal fees to the legal consumer. What a significant platform to operate from!

2) Reduce it to simple: Reduce your projects to their most simple parts and build a detailed task list to accomplish your goals. When writing documents, you should use the simplest language possible. Always reduce “legalese” to “simplese.”



BRANDI REDMAN is a mediator specializing in family law, probate, and housing matters. She was a senior/supervising staff attorney at the Legal Aid Foundation of Santa Barbara County for over seven-and-a-half years. Prior to joining The Legal Aid Foundation, she ran her own family law practice, specializing in advocating for survivors of domestic violence and their children. She is the Santa Barbara Women Lawyer's Affiliate Governor to the California Women Lawyers Board of Directors, a former President of Santa Barbara Women Lawyers, a former President of the Santa Barbara County Bar Foundation, and a former Board Member of the Santa Barbara County Bar Association. Ms. Redman can be reached at b.redman@cox.net.

WORKLIFE BALANCE

BY BRANDI REDMAN, ESQ., SUBMITTED BY SANTA BARBARA LPA



As attorneys, being analytical and logical is necessary. While creativity can help in certain instances, we mainly use the left side of our brain in our work. I have come to realize that utilizing my creative right brain rather than my analytical left brain is an important way to achieve balance in my life. For far too long, work was my primary focus. I love spending time with family and friends, but defined myself mostly based on my career. And working for the Legal Aid Foundation for the past seven-and-a-half years has certainly made it easy to give my job priority status. However, this unbalanced life began to take its toll. I found myself battling burn-out and I knew something had to change. That is, I had to “give voice” to the other sides of my personality and life. Enter singing.

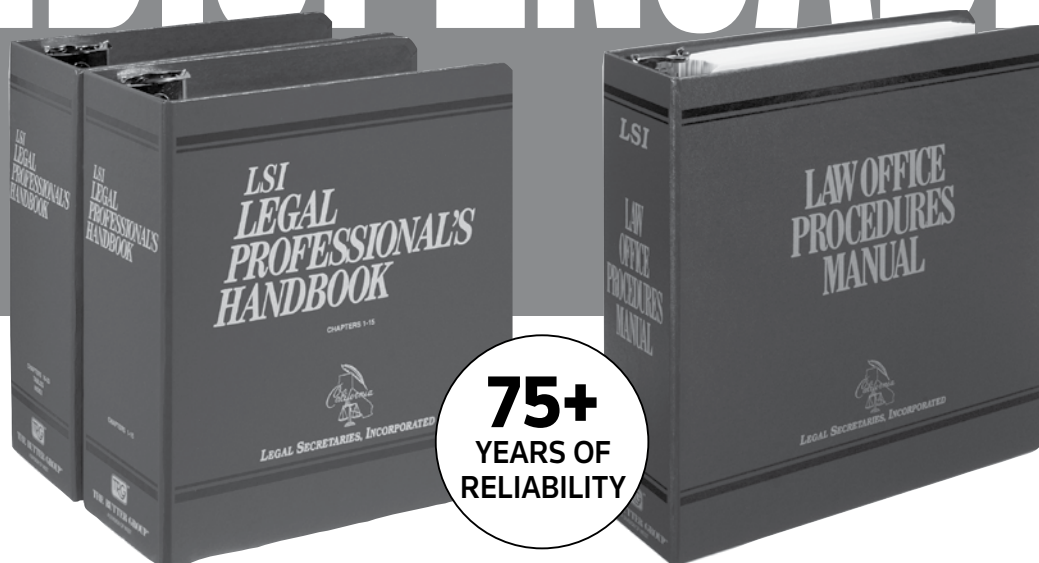
As a kid, I used to sing jazz, pop, and even some classical. I enjoyed the feeling of performing tremendously. I gave it up before I became an attorney. Then my career took on a life of its own and I forgot about my love of singing. A few years back, I remembered and realized life is far too important to ignore something you love to do. I began taking classes and started performing again. As of this date, I have performed many times, most recently two solo shows at Soho. I'll be

doing another solo show in a couple of months. Of course, it can be difficult to create the space for this part of my life. Organizing a show consisting of seventeen or so songs takes time and a lot of work. But I continually commit to it because it allows me to be creative, imaginative, and expressive in ways work cannot. And surprisingly this allows me to feel more engaged and fulfilled at work. Here's hoping you all have or develop some right-brained activities of your own.

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MICHELLE TICE, CCLS

Dear Friends,

This will be my final letter to you as Editor of our great magazine, The Legal Secretary. I would like to take this opportunity to thank a few people.

To President Sandra Jimenez: thank you for appointing me as Editor and for all of your support, wisdom, accolades and for just being you. You made this a fun appointment and I am delighted to have served under your leadership.

To my proofreaders: Terrie Quinton, CCLS, Annie Parrish, CCLS and Debbie Frias, CCLS, reading article after article can be boring, but you found time in your busy lives to help me out—even these words can't express how grateful I am for your assistance these past two years.

To our photographers, Espie Larios, Don Lee, Liz Adame and Cathleen Siler: You took some fantastic photos and believe me when I tell you it was difficult to choose which pictures should be published.. they were all so good!

To the officers, chairman, governors and past presidents: thank you for sending in articles for publication and for allowing me to interview some of you. I didn't get to interview everyone, but oh, what fun I had!

And finally to our members: thank you so much for your kind words these past couple of years. You make this job worthwhile.

I have made so many friendships over the years and I look forward to attending many more conferences. Since I don't want you to forget me, I'll leave you with a few photos that were taken at the last conference.

See you at Annual! *Michelle*

"Make it a habit to tell people thank you. To express your appreciation, sincerely and without the expectation of anything in return. Truly appreciate those around you, and you'll soon find many others around you. Truly appreciate life, and you'll find that you have more of it."

— Ralph Marston



Guidelines for Submission of Articles to *The Legal Secretary*

Deadlines for Receipt of Articles by Editor

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

Suggested Topics for Articles

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

Submission Guidelines

- Articles must be submitted by email as an attached document using word processing programs such as Microsoft Word or WordPerfect and saved as “doc”, “txt”, “wpd” or “ASCII” file. When sending email, include in subject line: “[Last Name of Author] and [contents]”, “i.e., Smith - Article, Bio and Photo.
- All articles submitted must be at least 500 words and no more than 2500 words.
- Articles sent in PDF format are not acceptable.
- All articles submitted must be accompanied by the name, email address, contact information of person submitting the article, and name of submitting Association. Articles that do not have this information cannot be considered for publication.
- Type all copy in Times New Roman 12 point type to fit across an 8-1/2” x 11” page, single spaced. Avoid using style attributes such as bold, italic, centering, columns or tabs.
- Articles are subject to approval and/or editing. Editor cannot guarantee publication in any given issue, although every effort will be made to publish as soon as possible after acceptance.
- Articles submitted and published in The Legal Secretary become the property of LSI unless prior agreement is obtained by the authors.

Photographs

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

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For more information, contact Cheryl L. Kent, PLS, CCLS, Legal Specialization Sections Coordinator. Office: (925) 837-0585; Email: clkcls@comcast.net

KERRY SPENCE

Continued from page 31

3) **Trust your intuition and training.** Your “gut feelings” can be trusted. They are telling you something – something missing, something overlooked, or another angle to pursue. Follow the threads of thoughts and organization and then listen for the click. There is a “done” click that you can feel intuitively if you listen closely that will tell you your project is complete. Do not doubt yourself. Trust yourself.

What do you most enjoy about working as a paralegal?

What I enjoy most about working as a paralegal is forming compassionate connections with my clients. I recognize that they are in a stressful situation; they are confused about their legal options and are concerned about the expense. I manage the legal process to maximize the power of their legal dollars.

Can you give us an example of an interesting case or project that you have worked on and your role in helping to achieve a positive outcome?

Recently, I had a client that was retired and on a limited income and going through a divorce. His wife hired an attorney who began sending ridiculous amounts of

discovery, either to make money before the signing of the settlement agreement or to frustrate my client into spending money, forcing him to compromise a fair settlement just to make it stop. I played the “pro bono” card and worked for my client for free. That felt very powerful to me and my client because it defused the money game and restored my client’s dignity. I heard my Daddy’s voice whispering “Do whatever is necessary to get the job done right.” My client was grieving the loss of his marriage, and in his grief had lost faith in the world. To engage with life he had to move forward with dignity and it was my privilege to help him achieve his goal. This was my act of compassion.

The next time I saw my client, his demeanor had completely changed – he had lost weight, was taking care of himself, dressing nicely, and was fully engaged in his life. I achieved my ultimate goal to restore my client to wholeness.

The following interview originally appeared on Paralegal411.org in September 2013. It is presented here with permission. We thank Kerry for sharing her sage and sincere wisdom. To learn more about her, visit her website People's Legal Docs or her blog, [Paralegal World – Kerry Spence's Notes from the Trenches](http://Paralegal World - Kerry Spence's Notes from the Trenches). You can also connect with Kerry via Twitter [@kerryspence5616](https://twitter.com/kerryspence5616).

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CCLS STUDY GUIDE (Revised 2012) Sample questions and answers to assist in preparing for all sections of the CCLS Exam.	25.00		
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CCLS STUDY KIT SECTIONS All sections include suggested 10 and 18 week syllabi.			
CALIFORNIA LEGAL PROCEDURE (CLP) CLP Section of CCLS Study Guide, CLP Worksheets, CLP Study Tips, List of Additional references required for CLP	30.00		
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LSI MEMBERSHIP BROCHURE Tri-fold brochure, extolling the advantages of LSI membership and programs. Contains request for membership application. (Rev. 12/11)	N/C		
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MEMBERSHIP APPLICATION FORM* 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. <input type="checkbox"/> E-mail -or <input type="checkbox"/> Printed	N/C		
NEW MEMBER PACKET* 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		
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*Item available to LSI members only.

(Prices effective 01/01/2013)

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