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The Importance of Vital Records Protection for Law Firms

BY RICHARD STEED

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

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Moving Onward and Upward in Unity

BY MARY J. BEAUDROW, CCLS



MARY J. BEAUDROW, CCLS

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

I have had the honor of serving as President of this prestigious corporation known as Legal Secretaries, Incorporated for the past two years. Where has the time gone? I have enjoyed my journey as being President very much, and this experience provided the opportunity for me to step out of my comfort zone. I am proud of the accomplishments that the corporation has made during my term.

As members of Legal Secretaries, Incorporated, we take pride in our motto *Excellence through Education*. We continue to provide educational opportunities to members and non-members not only at LSI conferences, but local association meetings, and now through online courses. Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair is hosting “Beginning Legal Secretarial Training” classes, and also a workshop entitled “Overview of California State Court Discovery.” The Beginning Legal Secretarial Training Class is an eight-week, work-at-your-own-pace online session, which utilizes video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. The Overview of California State Court Discovery class is a six-week, work-at-your-own-pace online course that also utilizes video lectures, discussion boards, and quizzes. I applaud Shaylene for volunteering her time in a way that makes such a difference to LSI. When I tell people about these courses, they are amazed that the courses are done by a volunteer. These online sessions offer a new way for LSI to market itself.

Terrie Quinton, CCLS, California Certified Legal Secretary Chair is hosting a CCLS On-Line Study Group. This is for members of LSI and non-members, and provides an opportunity to study for the CCLS exam, which is offered in March and October of each year. The online sessions take place once a week via WebEx video conference, covering all topics that are contained in the CCLS exam. Many local associations are unable to provide a CCLS study group, so this is a terrific alternative for those who want to take the exam.

In January 2016, the Law Office Administration Section of the Legal Specialization Sections hosted a Lunchtime Learning Webinar, entitled, “Legal Ethics for Paralegals and Staff.” A total of eighty-nine people signed up for the webinar, which is just terrific. What a great way for attendees to earn MCLE credit while sitting at their desk. I am happy to announce that the Legal Specialization Sections will be making these recorded webinars available to view on the LSI website at a cost of \$25.

The Governors approved a noticed bylaw amendment which combines the Criminal Law Section with the Family Law Section, and adds a Federal Law Section. The revised sections will be as follows: (1) Criminal/Family Law; (2) Federal Law; (3) Law Office Administration; (4) Litigation; (5) Probate and Estate Planning; and (6) Transactional Law. The new sections will be offered beginning in August 2016. The Legal Specialization Sections Leaders are very excited to be able to offer seminars in federal law, which provides a wealth of topics.

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

Merced County Legal Professionals Association did an outstanding job of hosting LSI's February 2016 Quarterly Conference at The Tenaya Lodge in Fish Camp with the theme, "Bear it All in Yosemite." Conference Chair, Stephanie Harrison, along with the members of Merced County LPA did an excellent job of taking care of every detail from food to entertainment. We couldn't have asked for more beautiful weather than what we experienced that weekend.

With the Governors approving the Executive Committee recommendation to approve the charter of Contra Costa County Legal Professionals Association, I am thrilled to announce that LSI has a new local association. Now Contra Costa County has two local associations to provide continuing education and network opportunities for the legal professionals in that county.

The Executive Committee received three bids to host LSI conferences, which were graciously accepted:

1. Placer County Legal Professionals Association – November 2017 Quarterly Conference.
2. San Fernando Valley Legal Secretaries Association – May 2018 Annual Conference.
3. Stockton-San Joaquin County Legal Professionals Association – August 2018 Quarterly Conference.

The February 2018 Quarterly Conference is still open to bidding. The deadline to accept bids for this conference has been extended to April 30, 2016. The new submission of bids will be announced at the 2016 Annual Conference and will be voted on at the Post-Board of Governors meeting on Sunday, May 22, 2016. Please consider bidding to host a conference. It is a great experience and an excellent opportunity to show off your community to conference attendees.



The 82nd Annual Conference will be held at the Flamingo Conference Resort & Spa co-hosted by Marin County Legal Professionals Association, and San Francisco Legal Professionals Association on May 19 – 22, 2016. Annual Conference offers a variety of Officer/Chairmen Workshops from being Treasurer of your local association, to building a website for your local association for marketing purposes. The officers and chairmen of LSI strive to provide as much continuing education as possible and will continue to do so throughout the next year.

I would like to extend my personal thanks to the members of LSI for having the confidence in me to preside over this prestigious corporation. My sincere gratitude to the 2014-2016 Officers and Chairmen for their hard work, dedication, and the willingness to say yes when I asked if they would join the board. They are the ones who truly keep this organization moving forward. This has been one of the most rewarding and challenging experiences of my life. I urge everyone to step outside their comfort zone and enhance your personal and professional life by becoming more involved. It may be one of the biggest steps you take, but it also may be one of the most important.

LS

JOCELYN ANDERSON worked her way through law school as a legal secretary, before qualifying as a lawyer in the UK. She now practices law full-time, but maintains a keen interest in the issues and challenges facing legal support staff throughout the industry. Jocelyn writes about the law and legal business.

What do Lawyers Want from Their Legal Secretaries and PAs?

BY JOCELYN ANDERSON, SANTA BARBARA LPA

On one level, there are as many answers to this question as there are legal secretaries and lawyers. Every working relationship is different, and most of us will have found out that what perfectly suits one relationship doesn't work at all in another.

However, as someone who has worked both as a Legal Secretary and as a lawyer, I think that there is one quality that most lawyers would agree is essential to the makeup of a really good Legal Secretary or PA. This is a quality that transcends personality types and practice specialisms, and you need it whether you are working for a family lawyer or a commercial lawyer, and whether your boss is permanently frantic or completely chilled. Looked at from the other side of the desk, your fundamental skill is to make your boss's job easier, however you achieve it.

Easy, eh? It's a lot less simple than it sounds. The big difference between you and your boss is that he or she has a billable hours target (and usually also an income target), and you don't – but make no mistake: that billable hours target has an impact on you and your work. No lawyer wants to see more hours devoted to "admin" on the timesheet than are absolutely necessary. The more you can free up your boss's time for chargeable work, the better you are doing your job.

It goes without saying that this means you perform the core skills in your job description efficiently, be they typing, filing, or supervision of the recycling, but most lawyers would say that making their lives easier goes much further than that. It's a matter of attitude as much as of a skill set. If you are the source of problems that your boss has to take time out to deal with, you will find that she or he will start looking at your overall performance more critically, no matter how excellent your core skills are.

Things go wrong in an office environment every day, all the time. These days, technology is the most frequent cause: the printer has broken down again, or the broadband service has disappeared. Miffed clients spend ages on the phone to you complaining about your boss's failure to

ring them yesterday afternoon. Something is setting the fire alarms off every 40 minutes. You or your boss got stuck in traffic during the school run. Any of this sounding familiar?

Again, it's a generalization, but most lawyers would prefer in these situations either to be totally unaware that there was a problem (you can always tell them afterwards how you rode to the rescue!) or to be told about the problem but also told that you have found a solution or at least a way around it. Some lawyers – a very few – are micro-managers and want to know every last detail about the broken printer or the fire alarm issue, but most just need to get on with building up their chargeable hours. As a general rule, the less time you spend reporting problems to your boss and leaving it up to him or her to solve them, the higher you will be esteemed by that boss. It is also worth keeping in mind that your ability to solve problems is likely to impact your salary significantly.

How far you can go in solving each problem depends on two things: the relationship you have with your boss and the office's organization. If you don't have the authority to get on the phone to the broadband provider and order it to reconnect the office PDQ, then don't overstep the mark. But if a problem is affecting your ability to do your job and therefore affecting deadlines that your boss has to meet, then at the very least you need to get informed. Find out who is dealing with the problem and what the timescales are. Identify any issues that need to be addressed immediately – missing a deadline is an obvious example – and spare your boss the effort and time of doing that her- or himself. Think laterally: If the broadband is down, is the fax machine still working, and could the document be

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ANA FATIMA COSTA, RPR, CSR is a consultant, author, coach and speaker. She utilizes the knowledge gained from her 35-year career in the court reporting field to educate the legal community about the vital role that court reporters have in the justice system: providing an impartial, verbatim transcript of legal proceedings. Her court reporting interns' participation at mock deposition and mock trial events in myriad venues throughout the greater Bay Area is a powerful reminder to attorneys and law students that they need to be more mindful of what they say, and how they say it. Contact Ana at www.anafatimacosta.com to schedule a consultation.

Guidelines for Respectful Attorney-Reporter Relationships

BY ANA FATIMA COSTA, RPR, CSR

A litigator schedules a two-hour deposition beginning at 4:00 p.m. The court reporter arrives at 3:30. Counsel agree at 6:00 to continue for another hour.

At 7:00 p.m., the witness' attorney asks, "How much longer?"

The questioner answers, "Just one more hour."

The reporter requests a short break to cancel her 7:30 p.m. dinner commitment.

"Just one more hour" is repeated until the deposition ends at 3:30 a.m. The exhausted reporter informs the reporting firm that they need to cover her 9:00 a.m. deposition. They scramble to find a replacement.

Why didn't the stenographer stop this marathon?

Court reporters strive to meet clients' needs, often sacrificing their own, even in grueling circumstances like the above true story.

Most attorneys are respectful of court reporters, but some transform into "alpha" personalities upon entering the deposition room. In their zeal to represent their clients, attorneys may forget to empathize with the human being charged with diligently protecting the record.

Writing shorthand at above 200 words per minute on a steno machine may appear easy, but in reality it is an intense mind/body experience akin to playing a symphony. No matter what transpires inside (and outside) the room, reporters maintain constant focus, always mindful of the record. Without proper consideration of their basic human needs, the record's accuracy may suffer.

In January 2015, BASF published an article by attorney Albert J. Boro, Jr., a member of its Legal Ethics Committee, titled *New Civility Guidelines for Professional Conduct*, excerpted here:



"In June 2014, the federal courts of the Northern District of California adopted 'Guidelines for Professional Conduct,' also called 'Civility Guidelines.'

The Guidelines describe an attorney's 'duty of professionalism' ... They were drafted with input from members of the bar to address a perceived 'decline in civility in federal litigation, especially on the civil side.' (Email from L. Fuller, Media Liaison for N.D. Cal., quoting Chief Judge Claudia Wilken, dated Nov. 26, 2014.) The Civility Guidelines are a reaffirmation of the importance of 'professionalism' by promoting zealous representation performed with candor, respect, empathy, and courtesy to opposing counsel and the parties."

Yet, a thorough reading of the Civility Guidelines provided no mention of a "duty of professionalism" toward reporters.

The following guidelines will help foster respectful attorney-reporter relationships:

Advise the court reporting firm if you will need a rough draft, realtime or expedited transcript. Expect to pay extra for these additional services.

Greet reporters with the same courtesy you extend counsel and the witness. Provide your business card and a copy of the Notice of Deposition.

Speak clearly and mindfully. Avoid mumbling or talking over one another. Slow down when reading documents.

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LEGAL SECRETARIES, INCORPORATED Officers and Chairmen Workshops

May 20, 2016

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

Schedule: 8:30 a.m. Introductions and Workshop Overview – J. Cori Mandy, CCLS
Location: Garden Room

10:15 -10:30 a.m. Coffee Break

Moderators: President's Roundtable (Incoming/Outgoing Presidents Only) Patricia E. Miller, PLS, CCLS (LSI Past President 1998-2000) Mary S. Rocca, CCLS (LSI Past President 2004-2006) Location: Alexander Room		9:00 a.m. to 11:45 a.m.
Moderators: How To Set Up Website for Your Association Rod Cardinale Jr., LSI Social Media Chair Larry McGrew, LSI Advertising Chair Dawn R. Forgeur, CCLS, LSI Legal Specialization Section Coordinator Location: Garden Room		9:00 a.m. to 11:45 a.m.
First Session – 9:00 a.m. – 10:15 a.m.		Second Session – 10:30 a.m. – 11:45 a.m.
<u>Treasurer's Workshop</u> Moderator: Lynne Prescott, CCLS LSI Treasurer Location: Walnut Room		<u>Newcomer's Workshop</u> Moderator: Diane M. Mecca Location: Walnut Room
<u>Hosting LSI Conference Workshop</u> Moderator: Erika Garduno, Vice President/Governor Desert Palm LPA Location: Courtyard 1		<u>Governor's Workshop</u> Moderator: Heather Edwards LSI Executive Secretary Location: Courtyard 1
<u>Parliamentarian Workshop</u> Moderator: Astrid B. Romero, CCLS LSI Parliamentarian Location: Oak Room		<u>Legal Secretary Training Workshop</u> Moderator: Shaylene Cortez, CCLS LSI Legal Secretary Training Chair Location: Oak Room

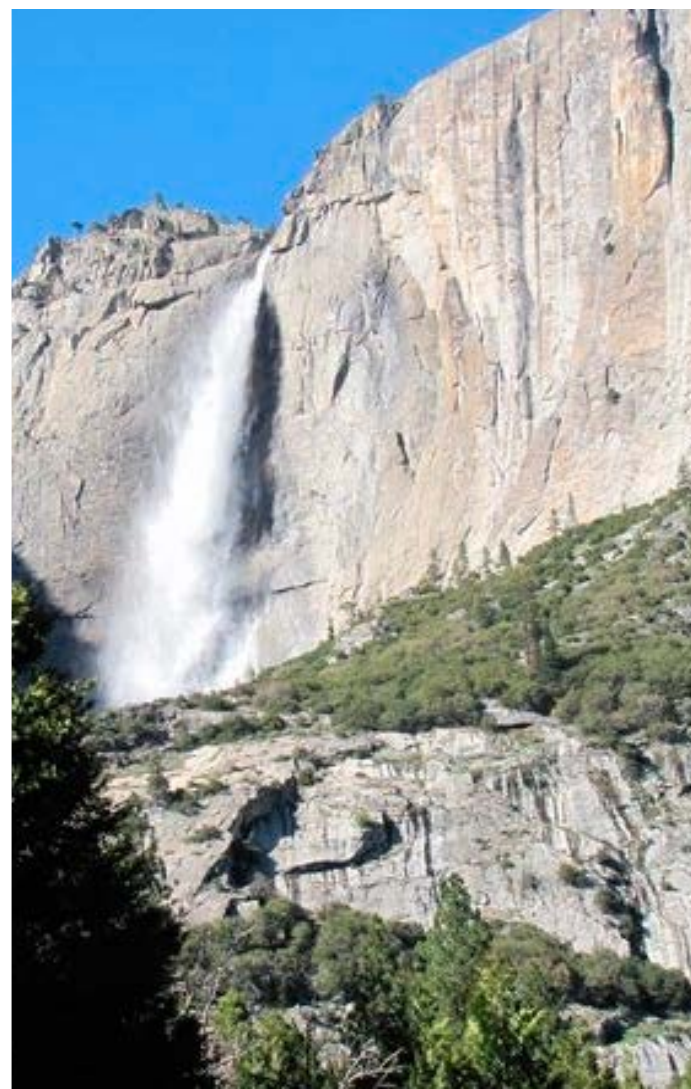
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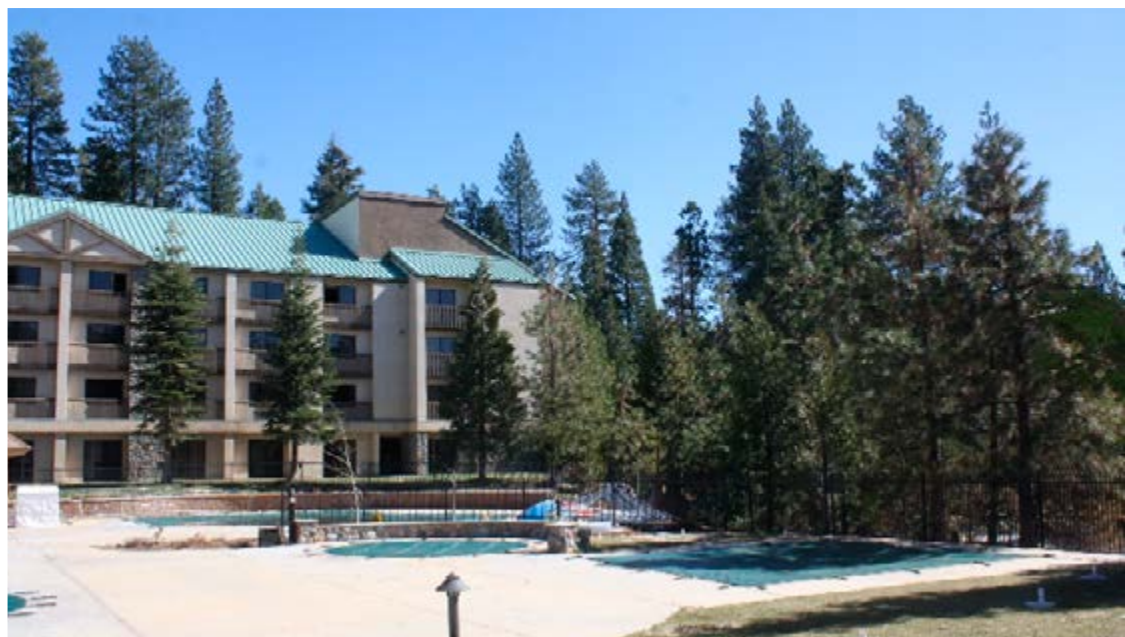
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KRISTI L. EDWARDS, CCLS has been a legal secretary for over 20 years. She is legal assistant and office manager for Burroughs and Froneberger in San Rafael, a transactional and estate law firm specializing in probate litigation and conservatorships. Currently serving as Marin County LPA president, she is an honorary member and has held all offices of MCLPA, along with many chair positions. She served LSI as Probate Section Leader for 3 years and is a member of the Marin County Bar Association in the non-attorney category.



CHRISTINE J. FLORES, CBA is a Bankruptcy Assistant currently employed in the San Francisco office of Orrick, Herrington & Sutcliffe LLP. She is a long-standing member of LSI, having begun her membership in the Southern Alameda County LSA, where she served in many capacities, including President. Christine has been an active member of San Francisco LPA since 1990. She has served in many capacities, including President. She currently serves as Governor, Executive Advisor and Historian. She also currently serves as an Assistant Editor on the Publications Revisions Committee, as well as Co-Chair of the 2016 Annual Conference.

Hooray for LSI: A Tribute to Hollywood

BY KRISTI L. EDWARDS, CCLS AND CHRISTINE J. FLORES, CBA, LSI ANNUAL CONFERENCE CO-CHAIRS

San Francisco LPA and Marin County LPA, along with the members of Sonoma County LSA, look forward to rolling out the red carpet for the May 2016 Annual Conference of LSI: *Hooray for LSI: A Tribute to Hollywood* on May 19-22, 2016 at the iconic Flamingo Conference Resort and Spa in Santa Rosa. The Committee hopes that you have decided on your red carpet look and have channeled your inner actor. Be careful because the paparazzi will be out in full force!

The Flamingo once welcomed the celebrities of the big screen who wanted to enjoy a more peaceful surrounding. No resort weekend is complete without attention to health and wellness. We're offering something new at this conference - an introduction to wellness, health and fitness at a group level for legal professionals! From Thursday through Sunday, jump-start your day at conference with meditation and early morning walks while enjoying the camaraderie of your colleagues! Later on in the conference - participate in stretching and other exercise routines you can take back to do right at your work stations. Come away with effective behaviors to increase your stamina while decreasing your stress. Remember to bring comfortable walking shoes and layers (e.g., turtleneck, wind breakers) for our a.m. walks! Get Moving and Be Well!

The lounge at the Flamingo as well as the lovely pool and patio area will be perfect settings to network and catch up with colleagues. Brush up on your movie trivia as we will be having some fun, testing our knowledge of some of Hollywood's classics! For those arriving on Thursday



for pre-conference meetings or to enjoy the beautiful Sonoma County Wine Country, One Legal will be hosting a reception on Thursday night. There will be an array of Officer-Chairman workshops on Friday to get the conference underway. The Legal Specialization Sections will be offering workshops from 4:00 p.m. - 6:00 p.m.

On Friday night you will be welcomed into the Mos Eisley Cantina in the Star Wars universe. Bring your light sabers, dress as one of your favorite Star Wars characters and let the Force guide you to an evening of fun. Following the welcome reception, enjoy a movie night on the premises. Be on the lookout for some special visitors who may join us.

The weekend will continue with the Pre-Conference Board of Governors meeting and the annual meeting of LSI on Saturday. Be sure to allow time to visit the display of local association bulletins and to vote for your favorite history book and scrapbook. Our Saturday night banquet will

Continued on page 13



SUZANNE GLOVER started her career in the law field in 1978. Today, she works part time as a paralegal for the firm of Carle, Mackie, Power & Ross in Santa Rosa, California. In her spare time, Suzanne is an author, speaker, hypnotherapist and coach. She has written hundreds of articles that help you stay positive, both in mind and body. Suzanne believes in helping you achieve your goals and offers a strategic way to map out your plan for success through stress management, positive mindset and learning to incorporate “ME TIME” in your plan so you are happy as well as productive while you achieve your goals. Suzanne offers her free guidebook, “I AM LOVING LIFE - Personal Development Plan Template and Goal Setting Guidebook” at suzanneglover-mvp.com/LSI.

Personal Development Plan Template: 5-Step Personal Action Plan

BY SUZANNE GLOVER, SONOMA COUNTY LSA

A good personal development plan template includes five steps that guide you to take action. When included, these five steps can make your personal action plan simple, yet effective.



In fact, keeping your personal development strategy simple is important when seeking a good template. Why is this important? Because when learning how to write a personal development plan (also referred to as a PD Plan), it is easy to get “analysis paralysis” if your example personal development plan is too complicated.

If you aren’t familiar with the term, “analysis paralysis,” it’s where you are so caught up in your head, that you just keep spinning thoughts around inside without taking any action.

What we want to do here is to identify the five key components to making a simple personal growth plan. These five steps, while they may seem overly simplified, are the core to any plan, whether it is a personal leadership development plan, personal professional development plan or a personal action plan.

So, when you are looking for a good template, the simpler you make it, the faster you can “get down to business” and take action.

So, what are these five key parts of your PD planning?

1. Identify goals
2. Prioritize goals
3. Action steps
4. Time line for action
5. What if I do nothing?

IDENTIFY GOALS

When you start your personal growth plan, of course you’ll want to identify what you want to accomplish. However, here’s where many people make their first mistake by not identifying goals that are truly what they desire or

are realistic enough to achieve. Be sure that your goals are what you truly desire at a deep, core level of your being.

PRIORITIZE GOALS

Once you find goals that are “what you want” and not “what someone else wants for you,” and these goals are realistic, there are certain steps to prioritizing these goals using something called “reverse goal setting.” This is exactly what it sounds like where you take your “end goal” and work backwards writing down each step it took to get there. Like you are walking your goal backwards.

ACTION STEPS

Once you’ve done your reverse goal setting and have a step-by-step map for your personal development strategy, an important part of your PD planning is to find a way to turn these “bread crumbs” you’ve identified as a sequence of goals into a personal action plan. To do this, simply ask yourself, “What can I do today on ‘bread crumb number 1’ to take action?”

TIME LINE FOR ACTION

Any example personal development plan will tell you that you must set out a time line for action. What you want to do is to create daily, weekly, monthly and yearly goals for yourself so you stay on track. Be sure with this part of your personal development strategy to keep it realistic with everything else you spend time on in your life.

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PERSONAL DEVELOPMENT PLAN TEMPLATE: 5-STEP PERSONAL ACTION PLAN

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WHAT IF I DO NOTHING?

When you want to develop a personal development plan, it's easy to be very motivated in the beginning. Your enthusiasm is ample to help you learn how to write a personal development plan and about the various parts of PD planning. After awhile, however, it is easy to set your personal action plan or personal growth plan aside, so one question you'll want to keep in front of you for motivation is, "What if I do nothing?" This one question can keep you going through the myriad of tasks of putting your template into action.

While finding a good personal development plan template or personal development plan sample isn't easy at first, using these five steps in learning how to write a personal development plan can get you started. Then you can turn your personal action plan into action, rather than spinning thoughts around and around "thinking" about taking action because your plan is too complicated.

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GUIDELINES FOR RESPECTFUL ATTORNEY-REPORTER RELATIONSHIPS

Continued from page 6

Allow the reporter time to mark exhibits.

Break every two hours. Regular rest periods are particularly important in fastpaced depositions and those containing complex terminology.

Consider reporters' needs before deciding to work through lunch. Include them when offering food to everyone in the room. Ask if a 30 minute break will suffice.

View reporters' interruptions for clarification of the record as confirmation that they are fulfilling their legal and ethical duty to produce an impartial, verbatim transcript.

If you anticipate that a deposition will go longer than expected, ask the reporter if s/he is able to continue, and for how long.

Clearly state your transcript order and when you need it. "Please" and "thank you" are the benchmarks of civility.

Attorneys and court reporters are equal partners, doing their best to meet their respective obligations. Clear, respectful communication will ensure everyone's needs are met.

This article was originally published in the February 2016 issue of the BASF Bulletin, a publication of the Bar Association of San Francisco:

<http://blog.sfbar.org/2016/01/04/paralegal-corner-guide-lines-for-a-respectful-attorney-reporter-relationships/>.

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HOORAY FOR LSI: A TRIBUTE TO HOLLYWOOD

Continued from page 11

begin with a walk on the red carpet. Dress to impress the paparazzi. This will be LSI's biggest night as the Chapter Achievement awards are given.

The Sunday morning brunch will be Breakfast at Tiffany's, and the newly-elected officers of LSI will be duly installed. Vintage attire of the 1960's is encouraged for this event. The conference weekend will conclude with the Post-Conference Board of Governors meeting following the brunch.

The Flamingo offers easy access to several fine wineries and several other attractions, including golf courses, horseback riding, hot air ballooning and several state parks, just to name a few. Montgomery Village Shopping Center with

over 100 specialty stores is within walking distance of the hotel. You may want to extend your stay to take advantage of what Sonoma County has to offer. This conference is an easy drive from all parts of the San Francisco Bay Area, and is accessible from the San Francisco and Oakland International Airports. Alaska Airlines has limited service to the Charles T. Schultze Sonoma County Airport in Santa Rosa from Southern California.

You have answered the casting call! We look forward to welcoming you to Annual Conference 2016: *Hooray for LSI: A Tribute to Hollywood!*

LS



SHANNON QUIGLEY has been in the legal field for 15 years and is a legal assistant for The Law Office of Janet L. Brewer (Estate Planning, Trust Administration, and Probate) in Palo Alto, California. Shannon joined SCCoLPA in 2011 and is currently serving on the board as VP of Membership & Marketing from 2014-2016 and was the former Executive Secretary from 2012-2014. In her spare time, she is currently pursuing her paralegal certificate at West Valley College, an approved ABA educational facility.



ELENA K. SCHNEIDER, CCLS is a Legal Assistant at the law offices of McManis Faulkner in San Jose, California. The firm's practice areas include Civil Litigation, Family Law, Employment Law, and Appellate Law. Elena has been in the legal field since 1993. She joined SCCoLPA in 1997, and earned the designation of California Certified Legal Secretary in March 2002. Since becoming a member of the association, she has served as Treasurer and held several committee chair positions. She currently serves as Parliamentarian for the 2014-2016 term.

Membership 911... Taking the Pulse of Your Members

BY SHANNON QUIGLEY AND ELENA K. SCHNEIDER, CCLS, SANTA CLARA COUNTY LPA

How are we doing? What can we do for you? These are age-old questions that professional associations have been asking their members for countless years to help find ways to improve quality of service they provide members and to increase membership. Yet time and time again, feedback is sadly limited or even non-existent. Why is it so hard to get answers? Many have speculated as to why, but no one knows for sure.



The main reasons to conduct surveys or poll membership is to find ways to make improvements that will keep current members interested and participating - to give them a sense of value in their membership and a positive experience. Organizations also want to attract new members and continue to grow. So how do you do that?

In our case, we decided to put together an on-line survey, using Survey Monkey, to see if we could find out why attendance at our monthly membership meetings were not as robust as we would like. In the hopes that our experience might help other associations, here are some ideas and tips that we found helpful.

KEEP IT SHORT!

Traditionally surveys can be a turn-off to some people, especially if they are too long. When we got together to discuss our own thoughts and ideas, we knew we wanted to keep the survey very short and ask very specific ques-

tions. After much discussion, we narrowed our focus down to just two main areas, and also decided to ask no more than 10 questions.

KEEP IT SPECIFIC!

The first area of focus was the date, time and location of our monthly general meeting. Perhaps the majority of our members were not able to attend a meeting on a Tuesday night, or if Tuesday night was fine, maybe the time commitment was more than they were able to give. Possibly the location was not convenient and that was the reason they could not attend. The second area dealt with the content and subject matter of our continuing legal education programs. Did we need to shift our focus or the types of presentations? We wanted to know what subjects or skills-based programs our members needed and wanted to see in terms of maintaining their CLE credits.

ALWAYS ALLOW FOR COMMENTS!

In addition to only 10 very specific questions, we allowed for comments under each one. This way responders could include their thoughts or suggestions for every question. This proved to be a very valuable tool, since not every question applied to every respondent. Almost every respondent included a comment and elaborated on their answers. This was exactly what we were hoping to see.

ANALYZE!

At the time of this writing, we have received responses from approximately 30 percent of our members. While this may not seem like a large number, it is actually much better than we have received in the past, so we are hopeful. The data we have gleaned from this limited response has given us a clear idea of what that group of our members would like to see. For example, of the responses we've received, almost 70 percent want see a change in the format of our meetings. This is valuable information which we will undoubtedly be discussing at the next meeting of the executive board.

PERSONAL TOUCH!

We also understand that not everyone was able to or interested in taking an electronic survey, so our next step will be to follow up with a good old-fashioned telephone call to those members who have not yet responded. We

hope that this personal touch will allow us to find out what changes they would like to see. We will also reach out to those who have already responded to let them know how much we value their opinion and appreciate the time they took to complete the survey. In going through this process, from the initial idea to the point where we are now, we have realized that we need to foster personal connections within our organization. It really is up to each of us to do more, to inspire others and to get to know each of our members

NEXT STEPS!

In the coming weeks, we will meet and analyze the results from our survey and telephone conversations. We are excited about the opportunity to consider and implement changes that will help us meet our goals in the coming year.

We hope you find these tips helpful. If you would like to know more about our survey or how to get started, feel free to contact us by email. Elena K. Schneider, CCLS (eschneider@mcmanislaw.com), Shannon Quigley (shannon_quigley@comcast.net).

LS**WHAT DO LAWYERS WANT FROM THEIR LEGAL SECRETARIES**

Continued from page 4

delivered that way? Should your boss think about getting a motorbike messenger? Don't leave it all for him or her to sort out. If you come up with some sensible alternatives, you are likely to be remembered as resourceful and dependable in a crisis. There are hardly two better skills to have recognized.

The better you know your boss, the more skilled you will be at doing this. Some lawyers are not particularly comfortable with secretaries managing office problems. Though, fortunately, these individuals are now rather old-school and gradually fading from the legal profession – and, as I have said, some lawyers are micromanagers and will feel that you are trying to take control away from them. Also, there may be a support staff line manager who has his or her own responsibilities. You have to be careful not to tread on someone's toes. Only you can judge how far you can go in offering your help.

As always in interpersonal relationships, the way you present yourself and the attitude you have towards the problem and towards your boss can make a world of difference. My experience as a lawyer and a secretary has proved to me that if you discuss problems in a cheerful and positive way rather than on a “we're all doomed” basis, that alone will improve your boss's working life immeasurably. Don't go over the top: “cheerful” does not mean “hilarious.” Try to be consistently fresh, positive, and reliable. It will change your own working life and probably your boss's, too.

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RICHARD STEED is the Vice President of Pacific Records Management, a leading provider of data protection for the legal community in Northern and Central California. For additional information please go to www.pacific-records.com or contact him directly at rsteed@pacific-records.com.

The Importance of Vital Records Protection for Law Firms

BY RICHARD STEED, STANISLAUS COUNTY LPA

Often, well needed attention is given to the protection of client and working files. However, a firm's *vital records*, or those documents that are necessary for the firm's sustainability, are not addressed. The key to resuming a firm's practice in the wake of a disaster are the advanced procedures that are in place for the restoration/recovery of these critical documents.

The havoc wreaked by super storm Sandy affected thousands of businesses along the East Coast. According to Eqecat, Inc. the overall economic damage is estimated to be as much as \$50 billion with \$10 billion to \$20 billion of insured losses. Many organizations were unable to operate for several days, while various others experienced catastrophic data loss. Law offices were not exempt from the fallout, with many smaller firms, in particular, unable to access case files in the wake of widespread power outages.

THE NECESSITY OF PREPARING FOR THE WORST

Unfortunately, business data loss is a common occurrence with stark consequences - as many as 90% of businesses are unable to continue after two years when their vital records are destroyed. While the West Coast isn't subject to devastation caused by hurricane related storms like Sandy, our geographical region certainly presents its own unique set of risks, including:

- earthquakes
- wildfires
- tsunamis
- floods
- mudslides

No matter what the threat, it's extremely important to prepare for any hazard that may lead to business interruption or loss of vital data. As the old adage goes, "an ounce of prevention is worth a pound of cure."



CONSIDERATIONS FOR LAW FIRMS

Because law firms have an ethical and legal duty to protect personal client data as well as mission critical business information, disaster can be a double-edged sword. Loss of client files may result in civil actions and regulatory non-compliance, while failure to protect *vital business records* can threaten the overall long-term viability of a firm. Vital records for a practice may include:

- corporate charters
- paid invoices
- accounts receivable
- personnel/payroll records
- software codes (including document management and litigation support software)

Since this data often resides in both hard copy and electronic formats, a disaster recovery plan should address the protection of the entirety of a firm's records and information inventory.

RECORDS AND DATA PROTECTION

Of course, being paper-intensive organizations, law firms should necessarily have contingency plans for hard copy documents and files. An offsite storage solution for paper records ensures protection of confidential information; it can also greatly enhance a firm's overall records management plan through documented storage, access and retrieval procedures throughout the retention lifecycle.

However, since firms are increasingly creating and storing documents electronically to improve accessibility and improve overall workflow processes, it's equally imperative to have a backup strategy in place in order to guard against potential loss of electronic data. A comprehensive data protection strategy should include a hosted cloud backup solution teamed with an offline backup strategy.

CLOUD BACKUP

An online cloud backup solution provides an automated process for the protecting and restoring of critical data without an additional investment in information technology equipment and staff. Additionally, data backed up to the cloud can be accessed and retrieved from any remote location with an online connection. Cloud backup, however, should be supplemented with a redundant offline backup solution.

TAPE BACKUP

Offline backup to tape or disk is an effective solution for protecting any critical archival data that may be important to the e-discovery process. As with a cloud solution, a backup tape can also be used for recovery purposes in the event of a disaster. Yet, like paper records, backup media should always be stored in an offsite location. A media vault environment ensures that archival electronic data (1) is preserved during required retention periods; (2) is protected from catastrophic loss due to fire, theft or flooding; and (3) provides a documented audit trail for supporting data recovery and legal/regulatory requirements.

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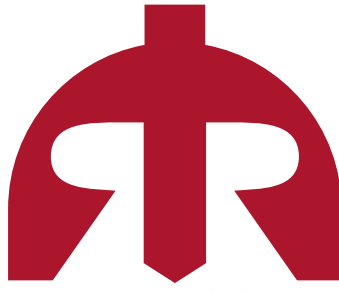
Congratulations to LSI's Newest California Certified Legal Secretaries

THE FOLLOWING INDIVIDUALS ARE TO BE RECOGNIZED AND COMMENDED FOR PASSING THE CCLS EXAMINATION ON MARCH 19, 2016:

Brenda Bracy, CCLS	Sacramento LSA	Maria Patterson, CCLS	Santa Clara Co. LPA
Elizabeth Cameron, CCLS	Santa Clara LPA	Jessie Ruedas, CCLS	Riverside LPA
Ruth Marina Durazo, CCLS	San Diego LSA	Denise Smith, CCLS	Non-Member
Lori Lovelace-Jones, CCLS	Santa Clara Co. LPA		

Passing the CCLS examination is a tremendous achievement and these new CCLSs deserve kudos for rising to the challenge and proving that hard work, dedication, and commitment can lead to fantastic results!

When you see any of these ladies, please offer your congratulations on their achievement. We invite you all to join us at LSI's Annual Conference in May 2016 as we honor these new California Certified Legal Secretaries at the CCLS Luncheon and Saturday Banquet.



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LSI extends its THANKS to Denise Lopes, CCLS LSI Historian and Don Lee, LSI Honorary Member,
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JUDYE RELEFORD is director of client development for BigHand. She has worked with Esquire Innovations since 2002, before it was acquired by BigHand in 2014. She can be reached at judy.releford@esqinc.com.

Five Tips to Work Smarter, not Harder – Starting Right Now

BY JUDYE RELEFORD

For legal support staff, there is never enough time in the day. This is particularly true as law firm staffs become leaner and legal secretaries/assistants find themselves supporting more attorneys. Because of this, law firms must become even more efficient in order to serve their clients and control costs.

work
Smart
nothard

As legal secretaries know too well, many efficiency efforts mean investments in new software as well as time spent learning that new product. Often this means added stress and additional chaos on top of their already stressful workload.

Fortunately, there are some techniques that are cost-effective, help to minimize errors and can be implemented immediately. Take document creation, for instance. Even legal secretaries who are deeply familiar with Microsoft Word may not know some simple, easy-to-use ideas that can have a big impact. Here are five tips for document creation that secretaries can implement starting today, which will allow them to become more efficient in their day-to-day work.

UTILIZE BUILDING BLOCKS FOR FREQUENTLY USED CLAUSES

Rather than typing and retyping the same phrases, legal secretaries can create shortcuts that will automatically store text for quick access. Common phrases, paragraphs, addresses and even tables of contents can be created once and retrieved easily. This increases efficiency and minimizes errors.

There are several ways to create these shortcuts, including using building blocks and auto text through the “Quick Parts” function. When typing in Microsoft Word, legal secretaries can select the content they

want to save and reuse, then click the “Insert” tab in the ribbon. In the “text” section, legal secretaries will find “Quick Parts.” There, they can find “Auto Text” and “Building Blocks Organizer,” where they can save these phrases. An even quicker method is to assign the text a name, then use the F3 key to create the auto text and building blocks.

While auto text is extremely handy for short phrases, building blocks are better for more extensive formatting and phrasing. Phrases can be easily called up—once a few characters have been typed out, Microsoft Word will automatically ask the user if he or she wants to insert auto text or the specific building block. When using building blocks, legal secretaries should employ a unique name to identify specific building blocks and auto text. Otherwise, it will become tedious to constantly disregard the cues from Microsoft Word.

CONSISTENTLY GENERATE TABLES OF CONTENTS

For many legal secretaries, the bane of their jobs is typing TOCs. The process is terribly inefficient and highly prone to error. Once something changes in the document or the TOC, document creators must make changes across the document. Doing this manually requires frequently scrolling back and forth between pages to ensure that everything is aligned correctly.

However, by using cross-references within documents, legal secretaries can link to different sections from the TOC. So when a change is made to a title or section heading in the TOC, it will automatically change within the document. Cross-reference tools can be found under “References” in the ribbon.

UTILIZE STYLES

Styles are formatting commands that allow legal secretaries to format documents in just a few steps. This eliminates the need to manually format certain items such as bolding text, centering specific blocks, making fonts a certain size and other techniques. Styles can be applied throughout the document to provide more consistency and save time. When documents are edited, Styles will update text automatically. The “Style” sections are located in the ribbon under the “Home” button.

DEVELOP TEMPLATES

Styles can be used for more than just individual documents. They can be inserted into templates, which makes them even more powerful. For example, by using a template to create a letter, legal secretaries can store margins, automatically place dates and indicate where other basic information belongs. Templates can also serve as the container for different styles. That means that when legal secretaries create documents, they don’t need to check whether formatting is correct, since it will already be established.

When faced with the task of creating a document, legal secretaries may decide the easiest approach is to update an older, somewhat similar document. However, this can lead to inconsistencies, corrupted files and other problems. With a template, these issues don’t occur. A template creates a fresh document every time, rather than recycling old files.

BECOME PROFICIENT WITH FIND AND REPLACE

The Control-H command for a “Find and Replace” is familiar to many legal secretaries for its most basic function. But it can be much more useful than simply swapping out words and phrases, particularly when it comes to changing formatting and other special operations.

For example, if a secretary has used italics in certain places, then decides to replace them with underlines, it’s easy to do through Find and Replace.

Find and Replace can also be used for document cleanup. When copying text from emails or from the Internet, formatting such as extra paragraphs and spaces is often carried over. With a few clicks, legal secretaries can easily replace paragraph breaks with a space, rather than combing through the document and trying to identify where breaks might be lurking.

While many law firms have become familiar with the relentless drumbeat of “doing more with less” in recent years, it’s still possible to achieve efficiencies with a minimum of pain and effort. In fact, by implementing these steps in the document creation process, legal secretaries can free themselves from the tediousness of many tasks. They also minimize the stress of inconsistencies. All this leaves more time to focus on helping busy attorneys achieve more with less time and effort.

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BEGINNING LEGAL SECRETARIAL TRAINING CLASS

LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing September 14 and ending November 9, 2016. During the classes, the following topics will be 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
Preparing a Proper Caption
Preparation of Documents Filed with the Court
Basics of Civil Litigation

CLASS SESSION OPENS ON MONDAY, SEPTEMBER 14, 2016

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The cost of the training class, which includes the Legal Secretary's Reference Guide, is \$150 for LSI members/\$200 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate from LSI.

BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION

(Please type or print clearly)

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\$150 LSI Member _____ Association: _____ LSA/LPA
\$200 Non-LSI Member _____

Payment: Check # _____ (made payable to LSI)
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)
Name on Card: _____
Visa/MC Credit Card # _____
Exp. Date: _____ 3-digit CVV No.: _____ Zip Code: _____

Email registration form NO LATER THAN September 8, 2016, to LSI Legal Secretarial Training/ Seminar Chair, training@lsi.org or mail to LSI, 2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833. Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after September 14, 2016. CCLS credit has been approved under Section 1e of the Standards for Recertification re self-study.

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APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:
CCLS Certifying Board, 14403 Leibacher Avenue, Norwalk, CA 90650

(Select one)

- ☐ **Northern California**
☐ **Southern California**

(Select one)

- ☐ **Saturday, March 19, 2016**
☐ **Saturday, October 15, 2016**

- **Deadline:** Applications must be received 60 days prior to the examination date.
- **Late Application:** Late Fees apply when Applications are received less than 60 days (but not less than 30 days) prior to the examination date, and accepted only if space is available.
- **Deferral:** Requests to defer to the next exam must be received at least 14 days prior to the exam date.

EXAMINATION FEES (Select Payment Type)		Check <input type="checkbox"/> Payable to "LSI" Mail to above address	PayPal <input type="checkbox"/> Email exam application to CCLSCertifyingBoard@gmail.com . Payment link will be provided upon confirmation of eligibility to sit for exam.
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On Time Registration Fee	\$ 25.00	On Time Registration Fee	\$ 75.00
Examination Fee*	100.00	Examination Fee*	100.00
Late Fee (if applicable)	30.00	Late Fee (if applicable)	30.00
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Personal Information

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Employment Information

Provide your legal secretarial employment information beginning with your most recent (or current) employment in order to confirm that you have at least two years' experience. Attach a supplemental page if you have not been in your current position for two years.

Position: _____ Dates of Employment: _____

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(name and address)

Supervisor: _____ Supervisor's Phone: _____

Supervisor's Email: _____

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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 not to be discussed with anyone, and that my employment record will be verified by a member of the California Certified Legal Secretary Certifying Board.

Date: _____

Applicant Signature _____

*Fees subject to change without notice.

Rev. September 2015



August 19-21, 2016
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Sacramento Marriott
Rancho Cordova, CA

Conference Registration Form

Name on Badge: _____
Mailing Address: _____
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Contact Phone: _____
Email Address: _____
Local Association: _____ LSA/LPA (full name)

Please check if applicable and include title:

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Individual Tickets

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Welcome Reception (Friday) _____ @ \$25.00 \$ _____

Luncheons (select one): ☐ shaved slow roasted turkey breast sandwich ☐ grilled vegetable wrap)

Officer Training Lunch (Friday) _____ @ \$30.00 \$ _____

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For general information contact Kim Oreno, kim@lsi.org or 800.281.2188

NO REFUNDS AFTER JULY 25, 2016



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Please note that room rates are guaranteed only until July 28, 2016 or until reserved room block is full, whichever occurs first.

To make reservations online:

<https://aws.passkey.com/event/14080292/owner/9323/home>

To make reservations by phone please call 800.228.9290 and reference LSI August 2016 Conference

For General Information Contact:

Kim Oreno

LSI Headquarters

Email: kim@lsi.org

Phone: 800.281.21



LEGAL SPECIALIZATION SECTIONS SEMINARS

May Annual Conference – May 20-21, 2016
Flamingo Resort & Spa, Santa Rosa

The deadline to register without a late fee is
Monday, May 16, 2016.

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Friday, May 20, 2016 – 4:00 p.m. to 6:00 p.m.	
<u>Transactional Law</u> Transactional Law Issues in the Wine Industry John Dawson, Esq. and Jay Behmke, Esq. Behmke Law <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER	<u>Family Law</u> Family Law/Bankruptcy James V. Sansone, Esq. Law Offices of James V. Sansone <input type="checkbox"/> I WILL ATTEND OR <input type="checkbox"/> HANDOUT ONLY <input type="checkbox"/> SECTION MEMBER - <input type="checkbox"/> NON-SECTION MEMBER
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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 2.0 hours each, by the State Bar of California. California Certified Legal Secretary credit offered is 2.0 hours.

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LEGAL SECRETARIES INCORPORATED (LSI) - BENEFITS

Note: This list is maintained for use by members of Legal Secretaries, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. LSI wants its members to find the BEST coverage for each member's individual needs and location. For information call these representatives directly.

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LSI Vendor Recognition 2015-2016

On behalf of its local associations, LSI wants to extend its thanks and appreciation and acknowledge every vendor who has supported our local associations at one of our recent conferences. Your support is very important to our organization.

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<i>Aptus Court Reporting</i>	<i>Caramia Collections</i>	<i>Chara Designs</i>	<i>First Legal Network</i>
<i>Janney & Janney</i>	<i>Kern Legal Services</i>	<i>Merrill Corporation</i>	<i>One Legal, LLC</i>
<i>Q9 Consulting</i>	<i>Barkley Court Reporters</i>	<i>Centext Legal Services</i>	<i>D4 LLC</i>
<i>HG Litigation</i>	<i>JHill's Staffing Services</i>	<i>Knox Attorney Services</i>	<i>Network Deposition Services, Inc.</i>
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<i>TaylorMorse</i>	<i>The Rutter Group</i>	<i>US Legal Support</i>	

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<i>Pacific Records Management</i>	<i>One Legal, LLC</i>	<i>BeautiControl</i>	<i>Eileen Gerber Clothing</i>
<i>Esquire Deposition Solutions</i>	<i>Beadazzled</i>		

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ROBERT B. JACOBS practices Real Estate, Business, Bankruptcy and Foreclosure Law in the Bay Area. Mr. Jacobs can be contacted at Bob7@RBJLaw.com. Property, title, and easement issues can be complex and results can be dramatically in any specific situation. This article is not a complete discussion of the subject addressed, and should not be relied on. Readers with specific questions or issues should consult an attorney.

Too Much Music

BY ROBERT B. JACOBS, LIVERMORE-AMADOR VALLEY LPA

California law provides that, among other things, a nuisance is “anything which is injurious to health, including, but not limited to, the illegal sale of controlled substances, or is indecent or offensive to the senses, or an obstruction to the free use of property, so as to interfere with the comfortable enjoyments of life or property, or unlawfully obstructs the free passage or use, in the customary manner, of any navigable lake, or river, bay, stream, canal, or basin, or any public park, square, street, or highway.” This definition of “nuisance” is found in *California Civil Code* section 3479. There may be other types of nuisance as well.

With respect to real estate, anything which unreasonably interferes with the “quiet use and enjoyment” of real estate can potentially constitute a “nuisance.” Such interference can potentially consist of smoke, odor, noise, or other unreasonable interference with the use of real estate.

In 1939 in New York, a business operated an outdoor dance floor with a live orchestra. This establishment was located in a residential neighborhood. The dance band would play every night until 1 a.m., and on weekends it would play until 2 a.m. On some nights the band would rehearse at 3 a.m.

Dance music can be enjoyable - but not necessarily at 3 a.m. when it's right outside your bedroom window.

The neighborhood residents filed suit against the Inn that operated the outdoor dance floor. At trial, the residents put on a convincing case as to the amount of noise and disturbance that was coming from the dance floor each evening. The trial court described the neighbor's case as “impressive” and summed up the situation like this: “The sounds of revelry by night, to the accompaniment of drums and brasses, assailed the quiet of the vicinage. Neighbors * * to the right and to the left described the tumult and the shouting with the disturbance of their sleep.”

The defendant's witnesses denied that there was much of a disturbance, but the court said that it found their testimony “unconvincing.”



The neighbors filed a lawsuit asking that the court order that the dance band and the dance floor close at an earlier hour each evening. The court noted that it was important to balance the interests of the neighbors against the rights of the business and those attending the dancing. The court stated that “people living in communities must endure some discomfort from each other - which is compensated by the advantages of ordered society. And in congested areas of population, with conflicting needs, there cannot be absolute rights, without balancing opposing interest. While older authorities placed emphasis upon the right of the property owner to use his business for a lawful purpose, the modern trend necessarily puts the stress upon the maxim ‘use your own property so as not to injure another’ and this includes . . . unreasonable noises at unreasonable hours.”

The court noted that “noise is an inevitable incident to urban life . . . The patter of rain on the roof is soothing - the drip from a leaky drain, distracting. The purr of a motorboat on a distant lake or the clatter of hoofs on a country road may be melodies of a sort, but never an exploding exhaust or racing motor outside your bedroom window. A bugle or a flute at a concert is enjoyable, but hardly a blaring radio or a wailing saxophone in the courtyard . . . It is not the clearly unavoidable kind of noise that bothers most people most. It is the seemingly inconsiderate human participation in it that irritates.”

In balancing the respective rights of the persons involved, the court stated that ‘my freedom to swing my arm ends where the other fellow’s nose begins.’ (This statement is actually an oversimplification - the right to swing one’s arm usually ends long before someone else’s nose begins.) The court stated “The question is, at what hour should the open air music stop? For by common consent of civilized man the night is devoted to rest and sleep; and noises which would not be adjusted nuisances, under the circumstances, if made in the daytime, will be declared to be nuisances if made at night, and during the hours which are usually devoted by the inhabitants of that neighborhood to sleep.”

The court found that the playing of loud music late at night could in fact constitute a nuisance.

In a bold move, the business suggested that “the neighbors of Claremont Inn should find the music late at night conducive to sleep.” The court noted that “They have found it otherwise” and “though the cacophony of a swing band

may fill the soul of a jitterbug with rapture, it fills the air with barbarous dissonance; in the ears of a weary worker.”

The business establishment wanted the outdoor band and dancing to continue each night until 1 a.m. The neighbors wanted it stopped by 10 p.m. each evening. The court concluded that the neighbors were entitled to relief and that the music had to stop each night before 1 a.m. But in what may be a surprising outcome, the court ordered that the outdoor band could play each night until midnight, and on Saturday evenings, and on evenings preceding holidays, it could play until 1 a.m. The case is reported as *Peters v. Moses* (1939) 12 N.Y.S.3d 735.

There you have it.

Nuisances, annoyances, and disturbances of the use of real property can involve complex questions of law, and persons involved with such issues should consult competent legal counsel.

LS



The advertisement features a background image of hands typing on a keyboard. Overlaid on this is the Behmke logo, which consists of the word "Behmke" in white on a black rectangular background, followed by "REPORTING AND VIDEO SERVICES" in black on a white rectangular background. Below the logo, there are two circular headshots: one of David F. Perry on the left and one of Denise L. Paulson on the right. Between the headshots is a bulleted list of services. At the bottom, there is a red banner with the text "Behmke is a proud sponsor of the LSI!". Below this banner is a black bar containing the email address "depos@behmke.com", the phone number "800.335.3376", and the website "www.behmke.com".

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OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY

LSI will be offering an online class on an Overview of California State Court Discovery. This class will be a six-week, work-at-your-own-pace online session commencing March 14 and ending April 25, 2016. During the classes, the following topics will be covered:

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Demand for Production of Documents
Requests for Admissions
Depositions

Demand for Physical Examinations
Deposition Subpoenas
Discovery Timelines and Service
Verifications

CLASS SESSION OPENS MONDAY, MARCH 14, 2016

Classes will take place online utilizing video lectures, discussion boards, email, whiteboard sessions, chat rooms, and quizzes. Login information will be provided upon enrollment in the class.

The content of this class is designed for legal secretaries and those studying for the California Certified Legal Secretary examination.

The cost of the class is \$30 for LSI members/\$50 for non-LSI members. Each individual must register separately. Upon completion of the class, students will receive a certificate of completion from LSI.

OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION

(Please type or print clearly)

Name: _____ Email: _____
Address: _____ City/Zip: _____
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Email registration form NO LATER THAN March 7, 2016, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to LSI (see website for mailing address). Checks should be made payable to LSI (Note: checks must clear before access will be released). Registration will also be offered online at www.lsi.org with PayPal. For further information or inquiries, email training@lsi.org. No refunds after March 15, 2016.

LSI – Educating California's Legal Professionals

CCLS QUIZ:

LEGAL TERMINOLOGY (LOPM GLOSSARY)

DIRECTIONS: FOR EACH WORD IN COLUMN 1, CHOOSE THE CORRECT DEFINITION FROM COLUMN 2. NOT ALL DEFINITIONS WILL BE USED.

COLUMN 1

1. ad litem
2. parol
3. in limine
4. res judicata
5. bequeath
6. interlocutory
7. voir dire
8. ibid.
9. nunc pro tunc
10. laches

COLUMN 2

- (a) negligence in failing to act more promptly
- (b) dispose of real property by will
- (c) in the same place, at the same time, in the same manner
- (d) on the court's own motion
- (e) provisional; temporary; while a lawsuit is still going on
- (f) conditional release from jail
- (g) for a specific, limited purpose
- (h) to speak the truth
- (i) on his own will
- (j) now for then
- (k) dispose of personal property by will
- (l) oral evidence
- (m) for this particular purpose
- (n) a thing decided; a matter adjudged
- (o) at the beginning

CCLS QUIZ ANSWERS ON PAGE 34

Dates To Remember In 2016

- | | |
|---------------------------|--|
| May 16, 2016 | Deadline to sign up for Legal Specialization Section Workshops at May Conference |
| May 19-22, 2016 | 82 nd Annual Conference
Hosted by Marin County LPA and San Francisco LPA
Flamingo Conference Resort & Spa, Santa Rosa |
| June 1, 2016 | Deadline for submission of articles for August issue of The Legal Secretary |
| July 19, 2016 | Last day to postmark August conference registration to receive discount |
| July 28, 2016 | Deadline to make hotel reservation for August conference |
| August 19-21, 2016 | LSI First Quarterly Conference
Hosted by LSI - Sacramento Marriott Rancho Cordova |
| August 15, 2016 | Last day to submit CCLS Exam Application to the CCLS Certifying Board |
| September 1, 2016 | Deadline for submission of articles for November issue of The Legal Secretary |
| September 15, 2016 | Last day to submit CCLS Exam Application to the CCLS Certifying Board with payment of late fee |
| October 15, 2016 | CCLS Exam |

Want to Get Published?

Looking to Contribute an Article?

LSI is always looking for articles geared toward the legal community.

If you are interested, please contact:

Editor, *The Legal Secretary*

Deborah Schmidt, CCLS at lsi.dschmidt@yahoo.com

ANSWER KEY TO P. 33 QUIZ

1. (g)
2. (l)
3. (o)
4. (n)
5. (k)
6. (e)
7. (h)
8. (c)
9. (j)
10. (a)

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, 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



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CCLS ON-LINE STUDY GROUP

BEGINS AUGUST 2016



If you are interested in studying for the California Certified Legal Secretary ("CCLS") Exam,** join LSI's CCLS On-Line Study Group. During the classes, all topics covered in the CCLS exam will be reviewed, including:

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- Skills (proofreading, following directions)
- Ability to Communicate Effectively (grammar, punctuation, word usage)
- Law Office Administration (computers, filing)
- Reasoning & Ethics (ability to act reasonably and ethically)

CLASSES WILL BEGIN IN AUGUST 2016

Classes will take place once a week via videoconference and will continue through the October 2016 CCLS Exam. Login information will be provided upon enrollment in the classes.

The cost of the 10-week Study Group is \$100 for LSI members and \$125 for non-LSI members taking classes for first time; and \$50 for LSI members and \$75 for non-LSI members repeating. Each individual must register separately.

NEXT CCLS EXAM SATURDAY, OCTOBER 15, 2016

Students will be provided with homework and handouts. **Students are responsible for providing their own *Law Office Procedures Manual*, *The Gregg Reference Manual* (11th Ed.), *California Style Manual* (4th Ed.), and *Pocket Guide to Legal Ethics*, NO LATER THAN the start of the classes.** Students are also encouraged to have the CCLS Study Guide.

***All examinees must meet eligibility guidelines outlined in the CCLS Information Kit on LSI's website.*

CCLS STUDY GROUP REGISTRATION WILL BE AVAILABLE

FOLLOWING LSI'S MAY 2016 ANNUAL CONFERENCE

FOR MORE INFORMATION PLEASE CONTACT:

LSI CCLS Chair
Terrie Quinton, CCLS
lsiccls@outlook.com

OR

LSI Corporate Office
Kim Oreno, Administrator
kim@lsi.org

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DEADLINES FOR RECEIPT OF ARTICLES BY EDITOR

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

SUBMISSION OF ARTICLES

Each officer and chairman is expected to submit an article for at least one quarterly issue during the fiscal year.

Each governor is expected to submit an article for at least one quarterly issue during the fiscal year and a guest writer article.

Articles are submitted by email as an attached document using Word or WordPerfect. Biography should be included in the article and digital photos should be submitted as separate jpeg files.

All articles must be at least 500 words and no more than 2500 words.

Deborah Schmidt, CCLS • Editor, *The Legal Secretary*
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For more information, please contact Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator, at dawn.forgeur@stoel.com.



LEGAL SPECIALIZATION SECTIONS

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August 1, 2015 – July 31, 2016

Membership includes access to free quarterly workshops at LSI conferences for those sections you are a member of; quarterly newsletters that include changes to the law and forms; discounted LSS webinars; statewide roster of all LSS members in each section for easy access to local procedural information in other counties; and networking opportunities.

	✓	LSI Member New/Renewal	Non-LSI Member New/Renewal
I would like to join all six sections!	<input type="checkbox"/>	\$75	\$150
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This information will be listed in the roster that is distributed to all LSS members.

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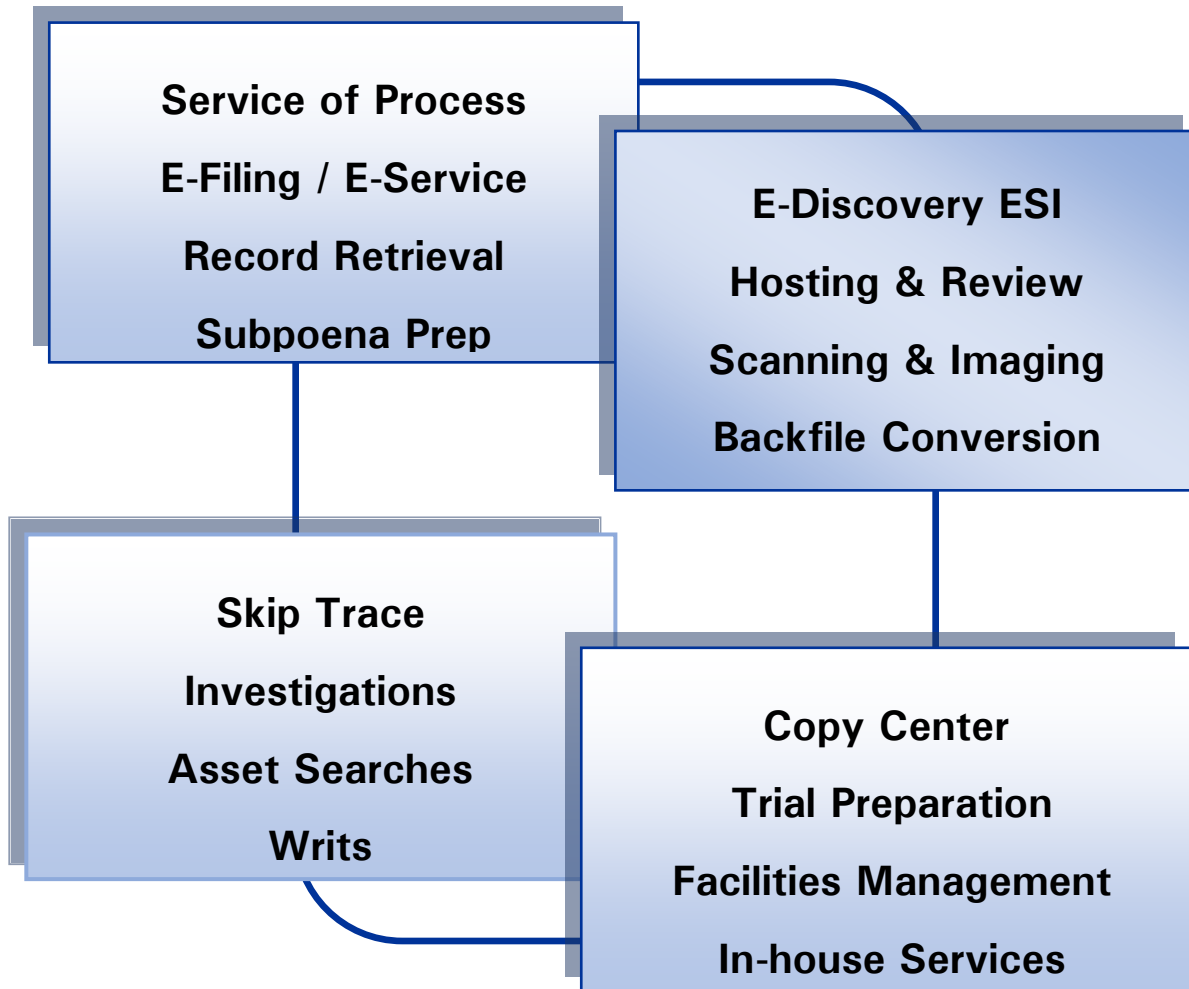
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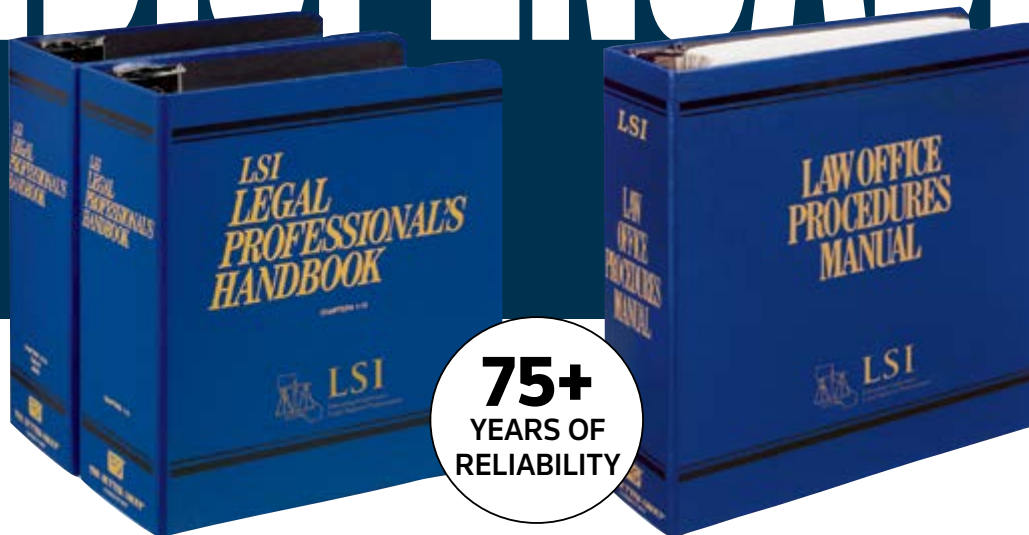
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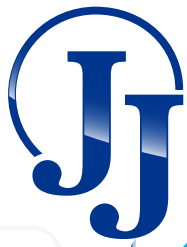
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