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It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct. — Dedicated to LSI Past President, Joan M. Moore, PLS, CCLS
President’s Message

BY HEATHER EDWARDS, LSI PRESIDENT

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

Does It Get Any Better Than This?
“Be the change you wish to see in the world” – Mahatma Ghandi

We all have the ability to create everything we desire. Hands down. No fine print. No exclusions. Imagine if everyone felt empowered to change their perspective positively and create the best possible life for themselves. Can you imagine if everyone spread just a bit more empowerment, had a bit more self-determination, and spread a bit more love? The world would definitely be a better place. Does it get any better than this?

Huge accolades to San Gabriel Valley LSA (SGVLSA) for hosting an amazing conference at The Hilton Los Angeles North-Glendale in Glendale, California. Conference Co-Chairs, Linda Lane, CCLS and Betty Thomas and their incredible SGVLSA team planned a very fun and successful conference with their theme, “A Weekend in Paris.” We appreciate and recognize the many sponsors, vendors, and volunteers who assisted in making the August 2019 Quarterly Conference an amazing success.

On Friday, The Continuing Education Council had its first MCLE seminar of the year. Michael Augustine of Augustine & Seymour spoke about “Fiduciaries-Selecting the Right One and the Interaction with Them.” Thank you to all attendees who participated and to LSI Educational Program Coordinator, J. Cori Mandy, who did an incredible job of organizing this informative workshop. The Friday Night Reception had a very cute theme, “Viva Les Tacos Bar” (tacos are a universal treat even in Paris) where we were treated to a very delicious Taco Bar complete with all the fixings followed by Bingo Night that was open to all. Members mingled and networked with our sponsors and vendors. The ambiance was delightful.

Early Saturday morning, Terrie Quinton, CCLS, CCLS Chair led a very educational CCLS Workshop, “A Good Old-Fashioned Spelling B-E-E” where attendees tackled the Ability to Communicate Effectively section of the CCLS exam. The Board of Governors met to discuss the business of the corporation and a very special thank you to our Saturday morning Welcome and Keynote Speaker, Nancy Bullock, Director of Civil Operations of the Los Angeles Superior Court, for spending her morning with us. We attended very informative and educational Legal Specialization Section (LSS) workshops under the supervision of our LSS Coordinator, Dawn R. Forgeur, CCLS and Section Leaders: Annette Davis; Renee Evans, CCLS; Mary Lou Floyd, CCLS; Bettina Jacobson; Belinda Owens; Cyndee Sauceda, CCLS; and Carmen

Continue on page 3

The Saturday evening Banquet inspired many to wear their finest Paris-inspired attire and Chapeaux/fascinators! Thank you to our Master of Ceremonies, Michael D. Kern, President & CEO of Direct Legal Support, for spending time with us and DJ, Jim Ayer, of Titan Legal Services, who provided music during and after banquet. Many enjoyed an evening of dancing and comradery well after banquet was over.

Our Inspirational Speaker for Sunday morning Brunch was Jennifer Hill, President of JHill’s Staffing Services, a Division of Marcum Search LLC. Jennifer spoke about the power of changing our perspective and the 3 step “Power of Pause” method: 1) 1-2 second pause; 2) Allow a Breath; and 3) Repeat. This will help with responding effectively to an issue instead of reacting. By changing our perspective positively influences our entire lives. Thank you Jennifer for your insightful and meaningful words. This was definitely an ‘aha’ moment for me. Does it get any better than this? Yes! It always gets better.

Looking forward to seeing everyone again in November at our 2nd Quarterly Conference in San Francisco hosted by San Francisco LPA at the Hilton San Francisco-Financial District. Conference Co-Chairs Carol Romo and Larry McGrew have an amazing weekend in store for us. Detailed information regarding the November 2019 Conference is included in this issue and on our website, wwwlsi.org. We look forward to our weekend “Tour of San Francisco.” Come to learn and enjoy networking with other legal professionals. LSI Conferences are fun, educational, and provide the utmost in professional development for the betterment of the most important person – YOU!

I urge each and every one of YOU to be part of our professional T.E.A.M. Let’s come together to EMPOWER and move LSI forward. Let’s be the change we wish to see in the world.

I look forward to seeing you in San Francisco!
We are T.E.A.M.
#meetLSI #myWhy #Empowered
1st Quarterly Conference
Q: Is this a career you chose, or did you just happen to fall into it?
A: I chose this as my career because it paid well and I knew I could find work anywhere I went. I also enjoyed secretarial responsibilities.

Q: What local association event did you attend for the first time, and when?
A: Alameda County LSA (ACLSA) – I attended a membership meeting in 1986, as I was invited as the scholarship winner.

Q: Who invited you?
A: I believe it was the President of ACLSA at the time, Judy Choate, PLS.

Q: What kept you coming back to your local association?
A: The friendliness and professionalism of members is what drew me in; also, the opportunities to develop my career.

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A: The friendliness and professionalism of members is what drew me in; also, the opportunities to develop my career.

Q: What positions/offices have you held at the local level, and which one(s) did you enjoy the most?
A: I have been Vice President, President, and Governor (several terms) for ACLSA. I enjoy being President and Governor the most.

Q: Do you remember your first LSI Conference?
A: I believe the first conference I went to was one hosted by ACLSA in Oakland, CA. I was young and loved the networking and fun that conference had to offer. I met lots of friends and connections in my career and loved the educational opportunities offered. I was considered the “baby” of the group and enjoyed going out and having fun, but then getting back to business and attending classes.

Q: What kept you coming back to LSI Conferences?
A: The people/members from other associations, as well as the educational and professionalism of this group. I formed a bond early on and have been coming to conferences ever since.

Q: What positions/offices have you held at the LSI level? Did you have a favorite?
A: I started out when Lorraine Bettencourt asked me to be the Day in Court/Professional Liaison Chair. I was so excited, and Pat Parson supported me in this role. I then was asked to be the LSS Civil Litigation Chair, then the Legal Professional Training/Seminars Chair, and I have now won the vote for Treasurer. I think my favorite so far was LSS Civil Litigation Chair because I worked with a group of great ladies (LSS Team) and got to work with speakers and educational workshops at each conference. I think this gave me the “want” to be part of this great LSI TEAM!

Q: Why do you continue to be a member of LSI - - why is LSI important to you?
A: LSI has always been a part of my life. I credit LSI for the success in my career, as well as my personal and professional development. LSI has so much to offer and makes me stand out as a leader in my career. It has always been recognized by my employers and has given me the opportunity to further my knowledge and skills. I often wish every legal support person would look to LSI to develop their careers. It has so much to offer – all you have to do is get involved. If everyone knew that this would mean better opportunities, raises, and support, why wouldn’t everyone join? I don’t understand it, but I have pretty much been the only one in my office who has been involved in LSI.

Meet LSI Treasurer Donna Day

Elected as LSI Treasurer at the May 2019 Annual Conference in Alameda, Donna is the newest member of the Executive Committee. For those who have not had the pleasure of meeting her, we asked Donna to share a little about herself.

Continue on page 7
Q: Why did you decide to run for LSI office?
A: I felt it was my time. I had considered it a couple of years ago, but it wasn't a good time for me. I look at it this way – I have been a member since 1987 and I do not plan on going anywhere anytime soon, so why not give back to the organization that has given me so much?! I want to be part of this organization’s movement forward and continue to grow with it. There is so much history behind LSI and yet we are making history now by what we are doing. I am very proud to be a part of that TEAM!

Q: What do you believe is/are the most important thing(s) LSI needs to do to remain relevant and keep moving forward?
A: I think continuing to offer what people want – EDUCATION! If we can provide the tools for legal support staff to continue their education and development while offering networking and professional development, we will remain viable. The main way to do this is through social media and marketing directly to law firms and administrators who make these decisions for their staff. If we could be the “go to” for all legal support staff’s education (and all the changes that it encompasses), we will continue to move forward and grow (maybe in different ways). Keys to success will be marketing and education.

Q: What legacy do you want to leave as a legal professional and LSI officer?
A: I want to see this organization grow and support legal support staff. The way to do that is through marketing and education, and to continue offering the things they want.
Meet Long Beach Legal Professionals Association

By Denise Aguilar, CCLS – Submitted by Long Beach LPA

In 1929 Eula Mae (Smith) Jett submitted a paper to the County Clerk that was not properly prepared and it was necessary for the Clerk’s staff to correct it so it could be filed. It was suggested by the County Clerk that it would be very helpful if the legal secretaries would get together and learn what was required in the preparation and filing of legal documents.

Eula Mae Jett took the suggestion to heart and mentioned it to her co-workers in Long Beach. They all enthusiastically received the idea and soon they were meeting on a regular basis to increase their knowledge. During these meetings it was revealed that there were problems common to all legal secretaries and it was a good forum for discussion and resolutions of many of them.

Soon after other neighboring counties legal secretaries had heard about the meetings and were interested in forming similar organizations. In 1934, representatives from Long Beach, Los Angeles, Pasadena and San Diego met for two days to consider banding together into one association. At the conclusion of this meeting the California Federation of Legal Secretaries had been organized with the aim of educating legal secretaries in legal procedure and the preparation of a loose-leaf procedural notebook.

A Code of Ethics, as well as a slogan, motto and the official colors of blue and gold were adopted. The Federation flourished and in 1940 there were 12 member chapters throughout California. Also, in 1940, the California Federation Legal Secretaries formed a California nonprofit corporation known as Legal Secretaries, Incorporated.

Over the years Long Beach Legal Secretaries Association has enjoyed the benefit of having many members and has provided educational programs for their members as well as welcoming members from other associations. Long Beach LSA, because of its longevity has had many seasoned members from long ago. I have had the opportunity to meet many of them and enjoyed hearing their stories from long ago, their escapades while at conferences and the many friends they made.

Long Beach LSA has had three members that have served as LSI President, Ruth Bauchet, 1936-1938, Cheryl Woodson (Fohring), CCLS, 1992-1994, and Linda Duarte 1994-1996.

In 2010, Long Beach Legal Secretaries Association members voted to change their name to Long Beach Legal Professional Association.

Long Beach LPA has had its share of membership ups and downs. But we still are thriving and our monthly newsletter The Driftwood is sent to our members every month and we include changes that are made in the Court system, coming events being held by other local associations so that are members have the opportunity to attend and network.

Currently our Board consists of Debby Tankersley, CCLS, President, Denise Aguilar, CCLS, Governor/The Driftwood Editor, Michelle Cassara, CCLS, Secretary, and Mary Wong, Treasurer.

In October Long Beach LPA will celebrate its 90th birthday!

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Meet Marin County Legal Professionals Association

BY AMBER KENNEDY - SUBMITTED BY MARIN COUNTY LPA

In 1955, our local association was chartered to the LSI family as the Marin County Legal Secretaries Association (“MCLSA”) by two friends, Jackie Wrischnik and Elise Caminita, thus becoming LSI’s 23rd local association. During the peak of the 1970s, MCLSA had over 50 members, and hosted the Board of Governor’s meetings in 1970 and 1976. MCLSA turned 25 years old in 1980 and hosted LSI’s Quarterly Conference in 1999.

To reflect the diversity of legal positions of the times, MCLSA changed its name to Marin County Legal Professionals Association (“MCLPA”) in 2003. In 2005, MCLPA celebrated its 50th Anniversary, attended by prominent members in the local community, including local Judges and many LSI friends, including LSI Past Presidents, from nearby local associations. Our long running newsletter, The Adjudi-Kate continues to be published, now available online, promoting our meetings, speakers, and upcoming events.

In order to evolve within the 21st century, MCLPA started holding meetings every other month, partnered with the Marin County Bar Association, created student and associate membership categories, moved to sending meeting invitations through Evite, and even created its own Facebook page. In 2016, MCLPA hosted its first LSI Annual Conference, where its very own Jennifer L. Page, CCLS, became LSI’s president after serving LSI committees since 1999 and being elected LSI Treasurer in 2010.

In 2019, MCLPA will be co-hosting its 2nd annual CLE event with the local bar association, providing a full day of CLE credit and thought provoking speakers. This event will have two separate education tracks, both open to attorneys and legal support staff.

Today’s MCLPA membership consists of 14 members, three of which are CCLSs, and two members who serve on LSI’s Executive Committee. Board members include, pictured in photo above left to right:

President: Jennifer L. Page, CCLS, member since 1991, LSI past president 2016-2018, currently working for Ragghianti Frietas LLP
Vice President: Starla Cooper, member since 2016, owner of Cal-Pacific Court Reporting
Treasurer: Siobhan Friedgood, currently working for Keegan Harrison LLP, tech guru
Secretary: Siobhan Friedgood
Governor: Amber Kennedy, member since 2013, currently working for Sonoma County Counsel’s Office

We may be small, but we are mighty. We are always evolving to reflect the needs of members and local legal community. I look forward to what MCLPA has in store for the future.
NEWSFLASH

NEW RECERTIFICATION PERIOD
EFFECTIVE 2020 – PLEASE READ

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

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

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

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

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

EFFECTIVELY IMMEDIATELY
CCLS Recertification Mailing Address Change

Vivian Shreve, CCLS
CCLS Recertification Chair
C/O APRIL IGNAITIS, CCLS
P.O. Box 2879
Cupertino, CA 95015

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

Board prefers email rather than mail
What’s your specialty?

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

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$75 - all six Sections

For non-LSI members:
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$150 - all six Sections

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

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

Visit the website for pricing & membership www.lsi.org
Harassment in the Workplace

BY MARY LOU FLOYD, CCLS – SUBMITTED BY MT. DIABLO LPA

There are many different forms of harassment in the workplace. What was once considered horseplay or innocent ribbing, can be harassment. However, for harassment to be considered unlawful, it must create a hostile work environment, or an environment that is offensive to a reasonable person.

The most common form of harassment is sexual harassment. Sexual harassment may not always involve touching, leering, or suggestive comments. Sexual harassment revolves around harassing behavior that can be clearly linked to sex. As long as the victim can link the harassing behavior to his/her gender in some way, that can be basis for a case.


ANY unwelcome behavior that can be based or linked to race, color, religion, sex, national original, age, disability or genetic information is harassment.

Other forms of offensive conduct include offensive jokes, slurs, name calling, physical assault or threats, intimidation, ridicule, insults, put-downs, offensive pictures, offensive objects, and any other form of conduct that affects the work performance.

A recent case out of California, demonstrates a form of harassing behavior that is associated with gender: Hayes vs. Temecula Valley Unified School District, Court of Appeal, 4th Appellate District, Division One, State of California, Case No. D072998 (filed 2/28/18).

Karen, a middle school principal, got excellent reviews for many years. Then a school district employee, a man, began criticizing her performance in front of her peers. The man also allegedly yelled at female co-workers and often slammed his fist on a desk when making a point. He only did this when talking to women and never when talking to men. Karen concluded this meant he was hostile toward women and not men. She complained to management and HR, but nothing changed. After being transferred to a different school, she sued, alleging she had been the victim of sexual harassment. The school district argued that his behavior was focused on performance and wasn't related to sex. But the court disagreed. It said that when poor behavior like yelling and slamming fists is only directed at women, it may be sexual harassment. Karen’s lawsuit will go to trial. (Courtesy of HR Specialist: Employment Law, Vol. 49, No. 3 – March 2019)
Preventing and striving to eliminate harassment in the workplace will create an environment where employees will feel free to raise concerns and feel free to point out unwelcome harassing conduct. Establishing a complaint or grievance process will confirm to employees that harassing conduct will not be tolerated in the workplace and must stop.

“Effective January 1, 2019, California requires employers with 5 or more employees (located anywhere) to provide not only two hours of sexual harassment and abusive conduct prevention training to supervisors (and to any out-of-state supervisors of California employees) but also at least one hour of such training to ALL their employees in California. All must be trained in the 2019 calendar year, before January 1, 2020…” (From CalChamber at https://offers.calchamber.com/sexual-harassment-training?c1=MSN_SE_LM&source=CA_TRAIN&cr2-lm_ca_-training&kw-harassment_training_california_exm&cr7-c&tsource=BingAds&utm_source=bingads&utm_medium-search&utm_campaign-prospecting&utm_content-general&utm_term-harassment%20training%20california)

At this point, ask the following questions:
1. Does harassment take place in our workplace?
2. Do we have steps in place for reporting harassment?
3. Have all employees participated in harassment training?
4. What do I need to do to ensure the workplace is free of any harassment?
5. Have all supervisors and employees received harassment training by the deadline of January 1, 2020? Do I have the documentation to prove this?

Harassment training can teach supervisors reporting responsibilities and how to respond to employee’s complaints. Steps to include in the process are for supervisors to immediately contact HR and report the incident. By providing proper harassment training, you can have confidence that your managers and supervisors will react in the proper manner to any harassment complaints.

A 2017 case from New York, demonstrates the value of having a procedure in place for reporting – giving notice – of any complaints: Duarte vs. St. Barnabas Hospital, Case No. 1:15-cv-06824 (S.D.N.Y. 2017):

Ruth had a hearing disability since she was a child. Still her boss frequently mocked and berated Ruth for her inability to hear well, sometimes calling her “deaf” and “stupid.” She didn’t report this to HR. But after she received a negative performance review, Ruth decided to write a rebuttal that included a specific complaint about the boss’s harassment. Nobody investigated it. Ruth sued for disability harassment. A jury awarded her $250,000 for mental suffering and punitive damages. The company asked the court to toss out the verdict because Ruth never officially filed a complaint with the company. But the court said that while she hadn’t used the formal complaint process, she had brought it to management’s attention during the review. And that was enough notice. (Courtesy of HR Specialist: Employment Law, Vol. 49, No. 2 – February 2019)

All bosses, managers, supervisors must report any harassment they become aware of – even if they are the victim. Tolerating harassment in any form and not reporting it indicates you condone the behavior. Staying silent is not an option but instead will cause the situation to fester and continue to grow until it is a more serious problem.

Consider a recent case EEOC v. Flash Market, Inc., Civil Action No. 2:17-cv-02717, U.S. District Court for Western District of Tennessee, Memphis Division:

“A female cashier at a Memphis gas station complained to her in-store manager that when the male regional manager would visit, he would proposition the cashier for sex and touch her inappropriately. The in-store manager’s response? She told the cashier she couldn’t help. And, in fact, she said the same regional manager had also harassed her in the past. The cashier still complained and was fired. The EEOC was sued on the cashier’s behalf and won a $100,000 settlement for her. The employer must also revamp its harassment policies and train all managers on appropriate reporting of complaints.” (Courtesy of HR Specialist: Employment Law, Vol. 49, No. 4 – April 2019).

Some helpful tips:
- Don’t shrug off complaints – conduct an investigation as soon as you learn about the alleged inappropriate conduct. Whether it’s frivolous or unfounded – investigate. If it’s an anonymous complaint – investigate.
- Have a process/plan in place. Why are you investigating? Who will conduct the investigation? Who are the witnesses to be interviewed? What evidence needs to be collected? What is your timeline for the investigation?
- Don’t take too long to investigate as this may allow for continued unlawful or inappropriate behavior and allow the situation to fester.

CONTINUED ON PAGE 15
Training – make sure each person is trained to conduct impartial, professional, and credible investigations. Or hire an outside party to conduct the investigation.

Don't conduct unlawful searches. Don't search employee's personal belongings. Don't monitor certain communications without consent.

Don't interview too aggressively. Claims can arise that lead to complaints of false imprisonment and coerced confessions. Choose an appropriate location for interviews. Use pre-approved and/or open-ended questions.

Don't promise confidentiality. Certain information gathered during the investigation must be disclosed to appropriate parties.

Create a report. Document the evidence, results, interviews, relevant findings. Include a summary of the matter, identity of parties and witnesses, description of documents, findings, credibility determinations, and recommended action.

Reach a conclusion – define steps to address the misconduct. Include confirmation of whether or not the misconduct occurred.

Don't take any actions that count be construed as retaliation against the person who made the complaint, such as moving their desk or putting them on leave.

Be consistent in your practices and use your best judgment.
ASSEMBLY BILL 5 (AB 5) – INDEPENDENT CONTRACTORS

California’s Assembly Bill 5 (AB 5) will dramatically reshape the contours of California's workforce and economy, and potentially reclassify two million independent contractors - roughly 10% of the state's workforce - as “employees” for purposes of state labor laws. AB 5 goes into effect on January 1. To address the myriad of potential legal and practical issues presented by this law, Littler Mendelson’s Workplace Policy Institute (WPI) has created a Task Force of subject matter experts in independent contractor and wage and hour law. The Task Force has tracked AB 5 as it developed, and has issued a series of reports along the way. Now that the reality of AB 5 is just around the corner, California businesses need to take steps to plan for the years ahead.

FRIDAY, NOVEMBER 22, 2019
5:15 p.m. to 6:15 p.m.

The Hilton San Francisco Financial District
750 Kearny Street, San Francisco, California

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

*Seminar is free with a paid conference registration
Legal Secretaries, Incorporated, an approved provider, certifies that this activity has been approved for minimum continuing legal education credit by the State Bar of California in the amount of 1.0 hour.
November 23, 2019
Deadline to register without late fee: November 15
Section Member - Free | All others - $15

11:00AM - 12:00PM
**Probate and Estate Planning**
Estate Planning for the Other 99%
Deborah L. Fox, Esq.
Fox Probate Group

**Civil Litigation**
Client Interactions for Personal Injury and Employment Cases
Scott Herndon, Esq.

3:00PM - 4:00PM
**Criminal and Family Law**
Impact of Divorce When a PreNup Exists
Jane Aceituno, Esq.
The Law Offices of Jane Aceituno

**Law Office Administration**
Working With Difficult People in a Law Firm
Diane L. Camacho, CLM

4:30PM - 5:30PM
**Federal Law**
Fear of Flying in Federal Court: Unique differences between federal and state court litigation.
Jim Wagstaff, Esq.

**Specialty Law**
How the Justice Department Conducts International Investigations of White-Collar Corporate Crimes
Marc Siegel, Esq.
Jones Day

REGISTER ONLINE AT WWW.LSI.ORG
The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.0 hour each, by the State Bar of California unless otherwise specified.
Join Us at LSI's 2nd Quarterly Conference - "Tour of San Francisco"

BY CAROL ROMO – SUBMITTED BY SAN FRANCISCO LPA

Greetings from San Francisco – or “the City” as we call it. Home of the Golden Gate Bridge, big earthquakes, Giants baseball, Governor Newsome, and grotesquely overpriced real estate. San Francisco Legal Professionals Association invites all of our fellow LSI members to come to the City where we will be hosting the next quarterly conference at the Hilton-Financial District in downtown San Francisco from November 22-24, 2019.

The airports nearest the Hilton Financial District Hotel are San Francisco International Airport (SFO) and Oakland International Airport (OAK). There is hotel shuttle service available from SFO for about $15.00 per person each way. See the Hotel Flyer and Registration Form under the Events tab at www.sflpa.org for details. Those flying into OAK or SFO can take Bay Area Rapid Transit (BART) to the Montgomery Street Station and use UBER or Lyft from there to the hotel because it’s another 5 or 6 long blocks to the Hotel from there which is not very practical with luggage in tow. The BART/Uber route also costs about $15.00 each way.

There is a hotel bar and restaurant (and room service is available during restaurant hours). But there are also many places to eat, drink, shop, and explore, all within walking distance just outside the front door.

A flash of your conference “passport” during the entire weekend will get you a signature cocktail, which is a Cosmopolitan, for just $10.00. Now, that’s a real bargain in San Francisco where there is said to be more billionaires per capita than any other city in the country, including New York.

Aside from the usual program of events for the weekend, we have some special things planned to go with our theme: Tour of San Francisco. Starting with a Chinatown welcome reception featuring dim sum appetizers; to be followed by a cable car bus tour that will take you to beautifully lit landmarks that adorn the City much like ornaments on a well-lit Christmas tree. This is a ½ hour private bus ride which comes complete with our own tour guide. It will run $35.00 per person which we think you will find well worth your hard-earned money. You must sign up in advance to get a seat on the bus so look for our registration form at www.sflpa.org after September 1, 2019.

Saturday morning features a very special guest speaker: the honorable Richard Kramer (Retired), who will welcome you to San Francisco and share some thoughts on the important role we play in the scheme of things infused with witty insight that comes from years spent on the bench of San Francisco Superior Court’s Complex Litigation Department.

During breaks in between meetings and workshops, you can walk out on a big bridge that connects the Hilton to Chinatown where you can take in some of the City’s historic Chinese culture and shop for souvenirs at the many gift shops waiting for you at the other end of that bridge.

Luncheons on Saturday will feature San Francisco’s famous sourdough bread shaped like a bowl and filled with white clam chowder or veggie soup if you prefer; with a salad.

CONTINUED ON PAGE 19
The formal Banquet on Saturday night is a black tie and black cocktail dress affair that will feature a guest speaker from the Bar Association of San Francisco. (We had asked the mayor of San Francisco but we did not have the required media coverage – maybe next time.) After the meal we have a karaoke DJ lined up for those of you who missed your calling on America’s Got Talent.

Sunday Brunch is centered around the longest running variety show in the US, which is sadly scheduled to close its doors at the end of the calendar year. It is called Beach Blanket Babylon (“BBB”) and features a woman dressed in a red gown dawning the biggest hat you have ever seen. It is decorated with just about every landmark in San Francisco and is carefully anchored to her head.

To commemorate this longest running variety show, we are inviting each LSI Association to compete in a hat contest at the Farewell Brunch on Sunday featuring an oversized hat decorated with landmarks representing each participating association’s home town, city or county. The hats will be displayed as centerpieces at the brunch tables where they will be judged by the Executive Committee of LSI. Ribbons and prizes for 1st, 2nd, and 3rd place will be announced and awarded at the brunch so we hope all LSI Associations will submit an entry for our BBB Brunch hat contest. (Note: hats can be sent ahead of time for those of you coming in by airplane.)

San Francisco has not hosted a conference since 2007 and we are very excited by this opportunity to showcase this world famous city with its great number of law firms in its Financial District and the big orange-red historic bridge (aka “Golden Gate Bridge”) as its gateway from the ocean.

Our members are looking forward to seeing you for a very memorable weekend in November.

Cheers!

P.S. The hotel rates for the conference weekend are only $159 for double or king and will be extended for any of you who may wish to stay in San Francisco (and possibly have family members join you) during any of the Thanksgiving week following the conference.
Beach Blanket Babylon Brunch Hat Contest

As we celebrate the best of San Francisco during the November 2019 Quarterly LSI Conference, we honor one of the longest running variety shows in the nation. Beach Blanket Babylon (BBB) has been a staple of this City’s entertainment for more than 30 years. Sadly it is soon coming to an end.

To commemorate this show, we will host a BBB hat contest at the Farewell Brunch on Sunday, Nov. 24th. As you can see, the hat worn by one of the stars of the show is a focal point that highlights San Francisco’s landmarks.

So, we are inviting each Association that plans to attend this Conference to participate by entering a BBB hat of their own (on a much smaller scale, of course.)

Each hat entered will be displayed as a centerpiece at a Brunch table. Ergo, the theme is Beach Blanket Babylon Brunch! (Try saying that 3 times real fast!)

The Rules for the BBB Hat Contest are as follows:

- Only one entry per Association
- If you plan to enter please let us know at conference@sflpa.org before conference starts.
- Each hat is to represent your Association’s local city landmarks.
- Dimensions of the hat should be no more than 18 inches in diameter and 18 inches tall.
- The spending limit to build your hat is $50.00.
- LSI officers will select the winners and prizes will be awarded during the Farewell Brunch as follows:

<table>
<thead>
<tr>
<th>Prize</th>
<th>Amount</th>
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<tbody>
<tr>
<td>1st Prize</td>
<td>$150.00</td>
</tr>
<tr>
<td>2nd Prize</td>
<td>$100.00</td>
</tr>
<tr>
<td>3rd Prize</td>
<td>$50.00</td>
</tr>
</tbody>
</table>

- Hats must be received by 1:00 p.m. on Saturday at the Conference Registration table.

Group photos of the winning hats and their Association members present will be taken at the end of the Brunch.

Shipping: If you are traveling by plane you can ship your hat ahead of time by emailing us for address information. We will save the original packing material so you can ship the hat back to yourself. Just bring a self-addressed, pre-paid shipping label for either UPS, FedEx, or USPS, and the hotel will drop it off for shipping on Monday.

For more information about the BBB hat contest, please contact: Carol Romo & Larry McGrew at conference@sflpa.org.

"Hats off" to crowell morning for donating the cash prizes for this BBB hat contest.
APPLICATION TO TAKE CCLS® EXAM

Mail Application, copy of LSI Membership Card (if applicable), and fees to:
April Ignaitis, CCLS, P.O. Box 2879, Cupertino, CA 95015

(Select one) (Select one)
Northern California Saturday, September 19, 2020 Saturday, March 21, 2020
Southern California Saturday, September 19, 2020 Saturday, March 21, 2020

- **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 **30 days** prior to the exam date.

**EXAMINATION FEES**

<table>
<thead>
<tr>
<th>LSI Members</th>
<th>Non-LSI Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Time Registration Fee: $25.00</td>
<td>On Time Registration Fee: $75.00</td>
</tr>
<tr>
<td>Examination Fee*: 100.00</td>
<td>Examination Fee*: 100.00</td>
</tr>
<tr>
<td>Late Fee (if applicable): 45.00</td>
<td>Late Fee (if applicable): 45.00</td>
</tr>
</tbody>
</table>

**TOTAL DUE w/o Late Fee:**
- LSI Members: $125.00
- Non-LSI Members: $175.00

**Personal Information**

- **Name:**
- **Mailing Address:**
- **Last 4 digits of SSN:**
- **Email:**
- **Phone (Day):**
- **Phone (Evening):**
- **LSI Member:** Yes (enclose copy of LSI Membership Card) No
- **Name of Local LSI Association:**

**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:**
- **Employer:** (name and address)
- ** Supervisor:**
- ** Supervisor’s Phone:**
- ** Supervisor’s Email:**
- **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 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. Aug 2019
Presented by: Leah S. Strickland, Esq.,
Solomon Ward Seidenwurm & Smith, LLP

NOVEMBER 7, 2019; NOON

Ethical Boundaries of Discovery in Social Media

Members of ALL Six (6) Legal Specialization Sections (LSS) – FREE!
LSI Member/Local Association Member – $15
Non-LSI Member or Attorney – $25

The price increases $5 after 10.24.19; Registration closes 10.31.19.

Online registration and payment available at: https://www.lsi.org/events/
OR
Click Here

The Legal Specialization Sections are a program of Legal Secretaries, Inc., an approved provider, and certify that these seminars have been approved for minimum MCLE/CLE credit of 1.0 hours each, by the State Bar of California unless otherwise specified.
BOBBY HENDRIX has a unique skill set of both being an MBA and a CPA. He looks at tax, personal, non-profit and businesses transactions with the acumen of both specialties. Bobby recently attained a Certified Fraud Examiner license motivated by recent cases he had handled in which he uncovered fraud or embezzlement.

MITIGATING FRAUD

BY BOBBY HENDRIX, MBA, CPA – SUBMITTED BY DESERT PALM LPA

Is Fraud occurring in your company or organization? Unfortunately most companies don’t find out until a major event has occurred. Let me say it this way, fraud WILL occur in your company if you don’t take measures to mitigate it. I would like to say that this statement is hyperbole, but the fraud numbers don’t lie.

The Association of Certified Fraud Examiners report that US Businesses will lose an average of 5% of their gross revenues from fraud, of which the median loss is $180k in small companies (businessfraudprevention.org). It comes to no surprise that small business is the most vulnerable to fraud. Small businesses have small accounting departments, with many relying on one person for all financial functions of their business.

This doesn’t mean that organizations are helpless against fraud. Organizations with proper culture and the correct financial policies and procedures will find ways to mitigate fraud in their organization.

1. Corporate Culture – Setting a culture of integrity and transparency from management will set the tone of the company. Employees need to see that unethical behavior has consequences and is not tolerated in the organization and that employees that do things the “right way” are rewarded. This does not occur unless everyone knows what is right and wrong. It seems silly to have to define this, but having a code of conduct for your organization is a good way to make sure that there is no gray lines when it comes to behavior.

2. Internal Controls – In creating internal controls, small business owners establish procedures their employees must follow. Business owners inform their employees of these procedures and expect that they follow them as they perform their day-to-day work duties. These established protocols help bring order and cohesiveness to the company and create separation of duties so that one person cannot create a fraud without it being noticed by another employee.

3. Being Accountable – The best companies make sure that their employees have the tools and freedom to do their job, but know that someone is reviewing. Accountability matters because not having it means no one can be held responsible. Employees need to understand what you expect of them, and that you’re holding yourself to the same high standard.

4. Third Party Review – having your independent CPA firm review your organization by doing a risk assessment of your company can tighten your controls and make you aware of potential issues.
STANISLAUS COUNTY LEGAL PROFESSIONALS
ASSOCIATION PRESENTS

Game Night!!!

February 21-23, 2020
Double Tree by Hilton
1150 9th Street, Modesto, California

Legal Secretaries, Incorporated
2020 Third Quarterly Conference

HOTEL REGISTRATION INFORMATION

Accommodations: (Plus applicable taxes and fees)
Standard Double Queen $139.00 per night
Triple or Quad $139.00 per night

Check in is 3:00 pm
Check out is 12:00 pm

Reservations: 1-800-222-TREE or the hotel directly at 209-526-6000

Group Code: SCL or Stanislaus County Legal Group

Deadline to reserve your room is January 27, 2020 – No Room Rate Guarantee After this Date

Parking: Self-Parking – 50% off in the 9th Street Parking Garage (Regular Price $12.00)
Valet Parking – $17 per night

Airport: There is no hotel shuttle from any airport

From Sacramento, Fresno, and San Francisco – you are 90 miles away off of Highway 99.
We look forward to seeing you shortly at the hotel.

Internet: Complimentary in Guest Rooms and Common Area

For Information Contact Registration Chair
Maureen Harrity – 209-681-7296 (call or text)
Email – StanislausCountyLPA@gmail.com
STANISLAUS COUNTY LEGAL PROFESSIONALS
ASSOCIATION PRESENTS

Game Night!!!
February 21-23, 2020
Legal Secretaries, Incorporated
2020 Third Quarterly Conference
DOUBLE TREE HOTEL - MODESTO, CALIFORNIA

CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____________________________________________________________
MAILING ADDRESS: ___________________________________________________________
CITY/STATE/ZIP: ________________________ WORK PHONE: _________________________
HOME PHONE: _________________________________________________________________
E-MAIL ADDRESS: _____________________________________________________________
LOCAL ASSOCIATION: _____________________________ LSA □ LPA □ (FULL NAME)

PLEASE CHECK IF APPLICABLE (INCLUDE TITLE):
□ STATE OFFICER □ STATE CHAIRMAN □ GOVERNOR □ CCLS □ PLS □ OTHER ________

SCRP TICKET (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

| POSTMARKED ON OR BEFORE JANUARY 22, 2020 | $145.00 | $__________ |
| POSTMARKED ON OR AFTER JANUARY 23, 2020 | $155.00 | $__________ |

INDIVIDUAL TICKETS

| REGISTRATION ON OR BEFORE JANUARY 22, 2020 @ | $25.00 | $__________ |
| REGISTRATION ON OR AFTER JANUARY 23, 2020 @ | $35.00 | $__________ |
| WELCOME RECEPTION (FRIDAY) @ | $30.00 | $__________ |
| LUNCHEONS □ VEGETARIAN | | |
| GOVERNOR’S LUNCHEON (SATURDAY) @ | $38.00 | $__________ |
| PRESIDENT’S LUNCHEON (SATURDAY) @ | $38.00 | $__________ |
| OPEN LUNCHEON (SATURDAY) @ | $38.00 | $__________ |
| BANQUET (SATURDAY) @ | $55.00 | $__________ |
| □ CHICKEN □ BEEF □ FISH | | |
| BRUNCH (SUNDAY) @ | $35.00 | $__________ |

TOTAL AMOUNT ENCLOSED

$__________

SPECIAL DIETARY REQUESTS (INCLUDING VEGETARIAN):
______________________________________________________________

Please Make checks payable to: February 2020 Conference Fund
Mail to: c/o Ross W. Lee, Inc., 611 13th Street, Modesto, CA 95354

For Information Contact - Registration Chair
Maureen Harrity- 209-681-7296 (call or text)
StanislausCountyLPA@gmail.com

No Refunds after February 7, 2020
A couple months ago, a friend and I attended a Pro Bono Bankruptcy Training. I stood by the side of the registration table, and inelegantly ploughed through my handbag to unearth my iPhone. After I located my phone through the chaos, I tapped the calendar application to choose a day to attend the Bankruptcy Clinic. I selected a date three weeks out from the training. Well, when it came time to assist at the clinic, I got flustered and whispered to myself, “I thought I gave myself plenty of time to prepare for the clinic, and three weeks was gone in a flash!” I share this story because in my opinion, this is how we will feel regarding the roll out of the new law, called the California Consumer Privacy Act (CCPA). The new law will go into effect January 1, 2020\(^1\), and the franticness of attempting to comply will be felt by all affected by these changes.

The CCPA was a bill passed by the California Legislature and signed into law by governor Jerry Brown on June 28, 2018.\(^2\) The bills objective is to improve the privacy rights of those who are residents of California. California will be the first state to pass a law of this kind.

Before it is time to go into full blown panic mode, the first question to ask yourself is, “Does the law apply to my business?” As of July 1, 2020, the California Legislature states the CCPA will apply to any for-profit business that collects consumers’ personal data, does business in California and satisfies at least one of the following:

- Has annual gross revenues of over $25 million;
- Is in possession of personal information of 50,000 or more consumers, households, or devices; or
- Earns more than half its annual revenue from selling consumers’ personal information.\(^3\)

With this information, you may be able to let out a sigh of relief, since most businesses do not run operations of that measure; however, it is still important to understand the law because those of us whom are California residents, may have rights regarding our personal data that we would like to protect.

Below is a list of some of your rights protected under the CCPA regarding your personal data. If you are a California resident, you will have the right to:

- Know what information is collected about you;
- Know whether your personal information is disclosed or sold, and to whom;
- Say no to the sale of your personal information;
- Access your personal information; and
- Access to equal service and price, even if you access your personal information.\(^4\)

If you are wondering what personal data is, the CCPA defines personal data as information that identifies, relates to, describes, is capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or household such as a real name, alias, postal address, unique personal identifier, online identifier Internet Protocol address, email address, account name, social security number, driver’s license number, passport number, or other similar identifiers.\(^5\)

CONTINUED ON PAGE 27
As a California resident, if you become a victim of data theft or a data security breach, companies may be ordered in a civil class action lawsuit to pay $100 to $750 per resident and per incident. Intentional violations carry a fine of up to $7,500 and unintentional violations have a fine up to $2,500. So, as you can see, this is an important issue not to be taken lightly.

The great question is, should we be worried with time appearing to move at lightning speed? As mentioned previously, the CCPA is effective on January 1, 2020; however, enforcement will begin on July 1, 2020.

In my opinion, begin to make small adjustments such as: researching what data you collect and what you already have on file, updating or drafting your privacy notices, updating your Terms of Service on your website, and revising agreements with third party service providers. Rather than acting frantically and waiting until the last minute to comply with the law, a few weeks prior to the effective date; establish a plan for the day it will arrive, sooner rather than later.

ENDNOTES
2. Id. at http://caprivacy.org/about-us.
5. Id. at A.B. 375.
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 (see CCLS Information Kit on LSI website for a description of the sections of the exam).

Lectures (MP4) and materials will be posted no later than 7 pm on Sundays. Students may complete the material at their convenience. Access information will be provided upon enrollment in the classes.

**Individual modules for each section of the CCLS Study Group are available!**

If you only need to study for a few sections, you may purchase individual modules for immediate upload at any time during the then-current Study Group class. You may also purchase all sections if you would prefer to study at your own pace.

| Reminder – all material is intended for individual use only, and not for local association study groups |

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.

Materials will be available to registered participants through the date of the next regularly scheduled CCLS Exam following the then-current Study Group session.

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

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**REGISTRATION FEES:**

<table>
<thead>
<tr>
<th>10-Week Study Group:</th>
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<tbody>
<tr>
<td>First time participation:</td>
<td>$100 Members</td>
</tr>
<tr>
<td>Subsequent participation:</td>
<td>$ 50 Members</td>
</tr>
</tbody>
</table>

**Individual Modules:** ($15 each Members; $25 each Non-Members)

- California Legal Procedure
- Legal Terminology
- Legal Computations
- Skills
- Reasoning & Ethics
- Law Office Administration
- Ability to Communicate Effectively

**ONLINE REGISTRATION AND PAYMENT AVAILABLE AT WWW.LSI.ORG**

**DEADLINE TO REGISTER IS JANUARY 3, 2020. NO REFUNDS AFTER JANUARY 6, 2020.**

If you have any questions about the Study Group, contact Terrie Quinton, CCLS, at cclschair@lsi.org.

STRIVE FOR SUCCESS – BE A CCLS!
CCLS QUIZ: ABILITY TO COMMUNICATE EFFECTIVELY - WORD USAGE

INSTRUCTIONS: CHOOSE THE CORRECT WORD(S) IN EACH SENTENCE BELOW FROM THOSE GIVEN.

1. **ENSURE/ASSURE/INSURE:**
   I _____________ you, I will _______________ that the painting is ______________ before it is hung in the gallery.

2. **APPRAISE/APPRISE:**
   Once the expert has _______________ the damage, we will _______________ you of his findings.

3. **EMINENT/IMMINENT:**
   The _______________ geologist has indicated that the homes on the cliff are in _______________ danger of sliding down into the sea.

4. **LIE/LAY:**
   Please _______________ the afghan on the back of the sofa so I can use it when I _______________ down for a nap later.

5. **EFFECTED/AFFECTED:**
   He _______________ an injured party persona in front of the jury, which _______________ an award in his favor.

6. **WHO/WHOM:**
   _______________ did they say was chosen?

7. **WHO/WHOM:**
   John, _______________ I considered to be their best chance at winning, dropped out of the competition at the last minute, leaving the field wide open for the person _______________ could run only slightly faster than a turtle.

8. **ADVERSE/AVERSE:**
   I am _______________ to all forms of exercise because I believe that it has an _______________ effect on my knees.

9. **FURTHER/FARTHER:**
   He will always go just a little _______________ in his efforts to run _______________ than the other person.

10. **IN BEHALF OF/ON BEHALF OF:**
    _______________ our organization, we are raising money _______________ the victims of the recent California wildfires.
Now that you’re a mom your family really needs you at home.”

“I’m not convinced that you’re going to be able to get here by 6:00 a.m. considering you have young kids.”

“That’s something your wife should be taking care of you, not you.”

If an employer makes similar statements, the employee may have a family responsibilities discrimination case. Family responsibilities discrimination occurs when employers make employment decisions based on gender-based biases about how employees should behave, without regard to the workers’ actual performance or preferences. The discrepancy between the employee’s actual performance and preference, and the employer’s assumption, is critical.

Family responsibilities discrimination is found in every industry and at every occupational level. Employees expect to be able to care for their family members – children, parents, and others – while still fulfilling their work responsibilities. Employers may expect “ideal workers” – workers who always work full time, are available throughout the workday and beyond, and don’t take any time off. There is increasing conflict as all adults in most families are in the paid workforce, male employees have increased family responsibilities, and aging parents need assistance. (Caregivers in the Workplace: Family Responsibilities Discrimination Litigation Update 2016, Cynthia Thomas Calvert, UC Hastings Center for WorkLife Law)

Family responsibilities discrimination manifests as “firing or demoting employees when they become pregnant; passing over more qualified parents for hire or promotion in favor of less qualified workers without children; firing employees without valid business reasons when they return from maternity or paternity leave; denying flexibility to employees who want it for child care reasons, while allowing flexibility to employees for non-family reasons (e.g., to participate on a sports team); firing employees whose spouses or elderly parents become disabled for fear of increased absenteeism or higher health insurance premiums; and fabricating work infractions or performance deficiencies to justify firing employees with family responsibilities; and denying break time and private space to breastfeeding employees to pump milk during the workday.” Id.

How to plead family responsibilities discrimination cases? Parental status is not a protected characteristic under either Title VII or California’s Fair Employment and Housing Act. Unlike nearly 100 states and cities, including New York, Minnesota, New York City, Philadelphia, San Francisco, and the District of Columbia, California does not have laws that explicitly prohibit family responsibilities discrimination (nor do any cities in San Diego County). One option is to plead gender discrimination. Discrimination based on motherhood or fatherhood can constitute gender discrimination. Family responsibilities bias is rooted in gender bias, as it’s based on gendered assumptions.

Federal and state family leave laws, such as the federal Family Medical Leave Act and the California Family Rights Act’s provisions for guaranteed leave and prohibitions against interference with leave may also be the appropriate bases for causes of action. For example, Cal. Gov’t Code §12945.2(1) provides, “It shall be an unlawful employment practice for an employer to refuse to hire, or to discharge, fine, suspend, expel, or discriminate against, any individual because of... an individual’s exercise of the right to family care and

CONTINUED ON PAGE 31
medical leave provided by subdivision (a). These laws can also be effective for representing employees whose family responsibilities involve leave to care for family members.

A seminal family responsibilities case is Chadwick v. WellPoint, Inc. (2009) 561 F.3d 38. In Chadwick, the employer denied an employee a promotion because the employee had four children. When informing the employee that she did not get the promotion, the decision maker told the employee, “It was nothing you did or didn’t do. It was just that you’re going to school, you have the kids and you just have a lot on your plate right now.” Thus the employer assumed that the fact that the employee had four children would preclude the employee from having sufficient time, resources, or motivation to perform the job well. The Court of Appeals noted, “Despite the decision maker not referring to sex, a jury could conclude that the statement was based on sex-based stereotyping. The fact that the employer promoted another woman with two children did not undermine plaintiff’s claims because (1) the employer did not show the decision maker was aware of the employee’s children and (2) the young age and unusually high number of children would have been more likely to draw the decision maker’s attention and strengthen any sex-based concerns that she had that a woman with young children would be a poor worker.” Similarly, in Back v. Hastings on Hudson Union Free School District (2004) 364 F.3d 107 a supervisor’s stereotypical comments that woman “cannot be a good mother” and perform her job requiring long hours was direct evidence of gender discrimination.

In Phillips v. Martin Marietta Corp. (1971) 400 U.S. 542, an employer did not hire women with preschool-age children but did hire men with such children. The employee was told that it was not accepting job applications from women with preschool-age children. However, the employer employed men with preschool-age children. Furthermore, 75-80% of the hires for the position were women. The Supreme Court held that employers can’t have one hiring policy for women and another for men with preschool-age children. Even if the employer does not discriminate against women generally, an employer can still be found to have discriminated against a particular subgroup of women (e.g. those with children). This type of discrimination is referred to as “sex plus” discrimination.

New supervisor syndrome is a specific form of family responsibilities discrimination. New supervisor syndrome occurs when an employee’s prior supervisor did not discriminate against the employee on the basis of the employee’s family responsibilities, but the new supervisor does – the new supervisor has animus towards the employee’s real or assumed family responsibilities. In New Jersey, a plaintiff presented evidence that while she was on leave, her new supervisor stated that plaintiff would likely need to leave work early to care for her children, and that new supervisor directed plaintiff upon her return to work that she could not in fact leave early to see her children. After employer terminated plaintiff for alleged misconduct, she sued, and obtained a $2,000,000 jury verdict. Ricci v. Daichi-Sanlyo, Inc. (N.J. Super. Ct. 2014) 2014 Jury Verdicts LEXIS 12104.

Second child syndrome, another specific type of family responsibilities discrimination, occurs when an employer tolerates an employee having one child, but develops animus toward the employee’s caregiving responsibilities, whether real or assumed, when the employee has a second child. The employer believes the employee can handle one child, but that after the employee has a second child, the employer assumes that the employee will no longer be as committed to the job or will otherwise no longer be a good worker.

Any case where an employer makes assumptions about the employee’s ability to perform a job based on the employee’s actual or perceived caregiving responsibilities, is a potential family responsibilities discrimination case. Cases where an employer retaliates against the employee for fulfilling his or her family responsibilities may also be considered family responsibilities discrimination cases, depending on the circumstances (for example, if the employee took protected leave to care for a family member). Family responsibilities discrimination cases increased by 269% over the last decade, and eldercare cases increased 650%. Id. The UC Hastings Center for WorkLife Law is an excellent resource for identifying and prosecuting family responsibilities discrimination cases. Distinguished Professor Williams, the Center’s Founding Director, helped create the field of work-family studies and modern workplace flexibility policies.

Reprinted with permission, TrialBar News; Volume 42, Issue 6; Consumer Attorneys™ of San Diego
During this time my roommate introduced me to her uncle and we began dating, and later shared an apartment. He was a Vietnam veteran and had a lot of anger issues. Needless to say, the relationship was not an easy one, but I was determined to make it work. However, things just got worse and worse.

I soon became acquainted with secretaries in the office next door, and in the next building. They invited me to a meeting of the San Bernardino Legal Secretaries Association. There I found knowledgeable women who were dedicated to their careers. I became a member in 1970 and served as Treasurer. I was elected as a Delegate to the 1973 LSI Annual Convention held at the Hyatt Regency, Embarcadero, in San Francisco. At the banquet we were honored to have the NALS President Ivy Pearson (Bakersfield) join us. I was totally in awe and impressed by the women who attended the Convention.

Wow, I was doing my own thing and making a lot of new friends. A year later, I got the courage to move out of the apartment I was sharing with my abusive boyfriend and into a small place of my own. But he kept showing up on my doorstep. Then, another door of opportunity opened for me.

In mid-1975 while working at the branch offices of Chase, Rotchford, Drukker & Bogust in San Bernardino, I was asked by the senior partner if I wanted to accompany him to the main office in Los Angeles and work as his secretary there. What, the “Big City”…I was a little afraid, but thought “What the heck, if I don’t like it I can always come back to San Bernardino.” I had a high school friend who lived in Carson, so I moved in with her family. I could finally put more distance between me and that old boyfriend.

I will never forget that first Monday morning in September 1975 when I had to drive the 110 Freeway from Carson to Downtown, I couldn’t believe the traffic. And then, I looked up at the building I had to go into which was the City National Bank building at 6th and Olive. The offices were way up on the 22nd and 23rd Floors. I was feeling weak and nauseous but I made it in and was cheerfully welcomed by staff and attorneys. They even had a birthday cake waiting.

I had already made contact with Los Angeles Legal Secretaries Association (LALSA) and attended one of their meetings. Everyone was so nice, I transferred my membership right away. I was asked to chair Scholarship and soon after I was elected Treasurer. I’ve held almost all the offices, including Governor, with President being the longest (8 terms).

I was asked by Carolyn Van De Pol, PLS, CCLS (LSI President 1990-92) to be LSI Advertising Chair. Then Linda Duarte (LSI President 1994-1996) asked me to be Editor of The Legal Secretary magazine. I was the first to feature the incoming LSI President on the cover of the August issue. I have also served LSI as Law Office Administration Section Leader (2006-2008) and LSS Coordinator (2008-2010), Annual Conference Chair (2009-2011) and the Liaison to the LPMT Section of the State Bar (2012-2014).

I decided to study for and took the CCLS exam in 1989, but did not pass until the second time around. This is a highlight in my career as a legal secretary and I am very proud of the designation.
I've met a lot of wonderful people throughout my 51 years as a legal secretary, and I've made many friends during my 49 years of LSI membership. I am trying to retire, but it's really hard for me. I hate to leave as I see the Association struggling with maintaining membership and I don't want to see it end. I know that it's the same in other professional organizations. The younger generation is not a “joiner” group and they are losing their ability to communicate face to face with others. They'd rather plug into a computer to attend a seminar, instead of going to a dinner meeting and mingling with others in their field. They are only interested in getting paid for doing a “job,” and they don't see it as a career to be proud of. I hope we find a way to change this soon.

Well, I hope you enjoyed my story of how LSI helped save me from a different life I might have had back in San Bernardino. Needless to say I did not move back and I sometimes wonder what would have happened if I had stayed there. I am grateful for all the opportunities membership has presented to me and I will cherish my LSI and LALSA friendships forever.

Helpful Websites

**Supreme Court of the United States**
http://www.supremecourt.gov

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

**California Courts**
http://www.courts.ca.gov

**California Association of Legal Support Professionals**
www.calspro.org

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

**California State Bar**
http://www.calbar.ca.gov

**California Legislative Information**
http://www.leginfo.ca.gov

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

**Public Access to Court Electronic Records**
http://pacer.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

**California Secretary of State**
www.sos.ca.gov
Dates to Remember in 2019-2020

October 23, 2019  LSI Webinar @ 12pm – Calendaring Basics – State and Federal Court Litigation

October 24, 2019  LSS Webinar @ 12pm – A Strategic Overview of Intellectual Property

November 15, 2019  Registration deadline for Legal Specialization Sections Seminars at LSI 2nd Quarterly Conference at Hilton San Francisco – Financial District

November 19, 2019  Registration deadline for CCLS Workshop (Legal Terminology - Vocabulary) at LSI 2nd Quarterly Conference at Hilton San Francisco – Financial District

November 21-24, 2019  LSI 2nd Quarterly Conference
                       Hilton San Francisco – Financial District, San Francisco, CA
                       Hosted by San Francisco LPA

December 1, 2019  Last day to submit articles for February 2020 issue of The Legal Secretary

January 3, 2020  Deadline to register for CCLS On-Line Study Group

January 12, 2020  CCLS On-Line Study Group begins through March 15, 2020

January 21, 2020  Last day to apply for March 21, 2020 CCLS Exam (w/o late fee)

January 22, 2020  Deadline to register for LSI 3rd Quarterly Conference at Double Tree Hotel in Modesto, CA without late fee

FROM QUIZ ON PAGE 29

CCLS QUIZ
ANSWER KEY

1. ASSURE/ENSURE/INSURE
2. APPRAISE/APPRISE
3. EMINENT/IMMINENT
4. LAY/LIE
5. AFFECTED/EFFECTED
6. WHO
7. WHOM/WHO
8. AVERSE/ADVERSE
9. FURTHER/FARTHER
10. ON BEHALF OF/IN BEHALF OF
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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<th>*NEW BENEFIT: LEGALSHIELD/IDSHIELD</th>
<th>QUESTIONS AND CONCERNS CONTACT:</th>
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<tr>
<td>Contact: Courtney Coats, Independent Associate (925) 580-6446; <a href="mailto:coats8@legalshieldassociate.com">coats8@legalshieldassociate.com</a></td>
<td>Lynne Prescott, CCLS, LSI Vice President LSI Marketing Committee Coordinator (916) 398-0120 <a href="mailto:slprescott7@gmail.com">slprescott7@gmail.com</a></td>
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<tr>
<td>LegalShield offers legal, identity theft protection, along with a massive Perks Program where you will have significant savings to over 500 local and national companies.</td>
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<td>Effective Date: June 1, 1996 CDP Card #447698 (800) 654-3131 <a href="http://www.hertz.com">www.hertz.com</a></td>
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<td>Discount on event tickets, movie tickets, theme parks, Broadway theater, sporting events, ski tickets, hotel certificates, family events, gift cards and more.</td>
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<tr>
<td>Member ID: Contact LSI Corporate Office, <a href="mailto:info@lsi.org">info@lsi.org</a>, or LSI Vice President</td>
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<td>CAPITAL INVESTMENT ADVISERS</td>
<td>LEGACY WEALTH MANAGEMENT</td>
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<tr>
<td>Emerson J. Fersch, CFP, ChFC, CLU, CASL</td>
<td>Daniel R. Henderson, MBA, CFP</td>
</tr>
<tr>
<td>5000 E. Spring Street, Suite 200</td>
<td>3478 Buskirk Avenue, Suite 300</td>
</tr>
<tr>
<td>Long Beach, CA 90815</td>
<td>Pleasant Hill, CA 94523</td>
</tr>
<tr>
<td>Office: (562) 420-9009 or (877) 270-9342</td>
<td>Office: (925) 296-2853 or (877) 679-9784</td>
</tr>
<tr>
<td>Fax: (562) 420-9955</td>
<td>Fax: (925) 944-5675</td>
</tr>
<tr>
<td><a href="http://www.ciadvisers.com">www.ciadvisers.com</a></td>
<td>E-mail: <a href="mailto:daniel@legacywealthmanagement.biz">daniel@legacywealthmanagement.biz</a> <a href="http://www.legacywealthmanagement.biz">www.legacywealthmanagement.biz</a></td>
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<th>DAVID WHITE &amp; ASSOCIATES</th>
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<tr>
<td>Wealth Accumulation and Preservation</td>
<td>Jory Wolf, President/Founder</td>
</tr>
<tr>
<td>3150 Crow Canyon Place, Suite 200</td>
<td>350 10th Avenue, Suite 1000</td>
</tr>
<tr>
<td>San Ramon, CA 94583</td>
<td>San Diego, CA 92101</td>
</tr>
<tr>
<td>(800) 548-2671</td>
<td>Office: (858)886-9842</td>
</tr>
<tr>
<td>Contact: Ryan Gonzales (ext. 2682), <a href="mailto:rgonzales@dwasociates.com">rgonzales@dwasociates.com</a>, or Matt Kay (ext. 2628), <a href="mailto:mkay@dwasociates.com">mkay@dwasociates.com</a></td>
<td>Cell: (510)919-9062 <a href="mailto:jory@athletesbiz.com">jory@athletesbiz.com</a></td>
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<td>P.O. Box 8007</td>
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<tr>
<td>Pasadena, CA 91102-6015</td>
<td>Redwood City, CA 94603-0907</td>
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<tr>
<td>(800) 894-1200</td>
<td>(800) 632-4699 - (650) 508-0300</td>
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<tr>
<td><a href="http://www.lafinancial.org">www.lafinancial.org</a></td>
<td><a href="http://www.providentcu.org">www.providentcu.org</a></td>
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<tr>
<td>Open to anyone living, working or worshiping in Los Angeles County, or referral from existing member.</td>
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Revised 05/2018
## LEGAL SECRETARIES, INCORPORATED – ORDER FORM

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<td>LSI ROSTER* Booklet with current listing of LSI officers, chairmen, past-presidents, honorary members, scheduled conferences, local association presidents, governors, and treasurers.</td>
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AVAILABLE FOR FREE DOWNLOAD ([www.lsi.org](http://www.lsi.org))

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<td><strong>Brass Tacks</strong> A guide instructing local officers and chairmen on how to perform their respective duties. Contains checklists, calendars, and forms. (No charge for pdf download @ <a href="http://www.lsi.org">www.lsi.org</a>)</td>
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<tr>
<td><strong>Brochures</strong> Single-page step brochures promoting LSI and its programs. (Also available for pdf download on LSI website, <a href="http://www.lsi.org">www.lsi.org</a>)</td>
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<td><strong>LSS Brochure</strong> Lists sections offered and reasons for joining.</td>
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<tr>
<td><strong>CCLS Brochure</strong> Promotes the benefits of taking the CCLS Exam.</td>
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<td><strong>GUIDELINES FOR PREPARATION OF A LEGAL EDUCATIONAL PROGRAM</strong> A guide, with sample forms, to assist with the planning and execution of a successful legal educational program. (No charge for pdf download @ <a href="http://www.lsi.org">www.lsi.org</a>)</td>
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**LEGAL PROFESSIONALS HANDBOOK/LAW OFFICE PROCEDURES MANUAL FLYERS**

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*Item available to LSI members only.

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ASSOCIATION: ________________________
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**METHOD OF PAYMENT:**
CHECK, PAYABLE TO “LSI” ENCLOSED □
VISA □
MASTERCARD □
AMOUNT CHARGED: $ ____________

**CREDIT CARD INFORMATION:**
NUMBER: ____________________________
EXPIRATION: MO _______ YEAR _______

**NAME ON CREDIT CARD:** ____________________________
CARD VERIFICATION NO.: ____________

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