

HISTORY

OF

**LEGAL SECRETARIES,
INCORPORATED**



LSI

*Educating California's
Legal Support Professionals*

AD HOC HISTORY COMMITTEE 1982:

CATHARINE RYAN, PLS, Chairman, San Francisco LSA
HELEN G. BANGS, Orange County LSA
DARLENE JONES, Glendale-Burbank LSA
JUDITH SCHNITZER, Long Beach LSA

Revised:

1986 - RHODA C. SPENCER, PLS, CCLS,
LSI Executive Advisor
1993 - CAROLINE E. VAN DE POL, PLS, CLA/CAS, CCLS
LSI Executive Advisor
1996 - CHERYL WOODSON, CCLS
LSI Executive Advisor
1997 - LINDA DUARTE
LSI Executive Advisor
2000 - DEANNA A. PEPE, CCLS, PLS
LSI Executive Advisor
2002 - PATRICIA E. MILLER, PLS, CCLS
LSI Executive Advisor
2004 - YVONNE WALDRON-ROBINSON, CCLS
LSI Executive Advisor
2006 - KAY J. THORNBURG
LSI Executive Advisor
2008 - MARY S. ROCCA, CCLS
LSI Executive Advisor
2010 - LORRAINE BETTEN COURT, PLS, CCLS
LSI Executive Advisor
2012 - CHRISTA DAVIS
LSI Executive Advisor
2014 – SANDRA T. JIMENEZ, CCLS
LSI Executive Advisor
2016 – MARY J. BEAUDROW, CCLS
LSI Executive Advisor
Dedicated to

The members of
LEGAL SECRETARIES, INCORPORATED

Dedication made in 1982 under the direction of
JOAN M. MOORE, PLS, CCLS
LSI President 1980-1982

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PREFACE

One day in 1929, a young legal secretary was chagrined to find that a paper she brought to the office of the County Clerk had not been properly prepared and it was necessary for the Clerk's staff to correct it so it could be filed. The County Clerk suggested that it would be very helpful if the legal secretaries throughout the county would get together and learn what was required in the preparation and filing of legal documents.

That suggestion was taken to heart by the secretary in question, Eula Mae (Smith) Jett, and she mentioned it to her co-workers in Long Beach. The idea was enthusiastically received and soon they were meeting on a regular basis to increase their knowledge. Those meetings revealed that there were problems common to all legal secretaries and it was a good forum for discussion and resolution of many of them.

Soon, news of the Long Beach meetings spread to neighboring counties where legal secretaries displayed interest in forming similar organizations. In 1934, representatives from Long Beach, Los Angeles, Pasadena and San Diego met to consider banding together into one association. At the conclusion of a two-day session, the California Federation of Legal Secretaries had been organized with the aim of educating legal secretaries in legal procedure and the preparation of a loose-leaf procedural notebook.

After organizational details were completed and the Federation was functioning, applications for membership were processed from throughout California. An Out-of-State Membership Chairman was appointed to encourage communities in other states to form similar associations, the seed of a national association being planted.

Soon, a Code of Ethics, as well as a slogan, motto and the official colors of blue and gold were adopted.

The Federation flourished and by 1940 there were 12 member chapters throughout California. In July 1940, the California Federation of Legal Secretaries formed a California nonprofit corporation known as LEGAL SECRETARIES, INCORPORATED.

The projects begun by the Federation were continued, expanded and increased. Bylaws and rules for the smooth functioning and growth of the corporation were prepared and adopted.

During the years of World War II, the efforts of the officers were, of necessity, directed towards holding this new organization together since travel was curtailed. In addition, many members enlisted in the armed services or went to work in war plants, but they could retain their membership status under those circumstances. Despite the difficulties encountered, and thanks to the untiring efforts of the leadership, the association did continue and in post-war years began to grow.

By 1949, there were 23 local associations and much thought was given to the way in which a national association could be established. At the Board of Governors meeting in October 1949, the necessary action was taken and Articles of Incorporation were prepared and filed for the National

Association of Legal Secretaries, thus bringing to reality the dream of the founders of the organization. Membership in the National Association of Legal Secretaries ("NALS") eventually became mandatory for each member, so it became a tri-level organization, i.e. local, state and national. Legal Secretaries, Incorporated, contributed much to the growth and prosperity of the National Association, both through per capita tax and personnel. However, in 1981, because of insurmountable differences, Legal Secretaries, Incorporated, voted to withdraw from the National Association.

After the withdrawal from NALS in 1981, LSI once again set out to increase membership, and by May 1992 there were 60 associations and almost 4,000 members. In the mid 1990s LSI began to see a decline in membership due to a struggling economy.

As Legal Secretaries, Incorporated, continued to thrive, it expanded existing projects and adopted new ones, all of which are discussed in other sections of this history. The basic structure and aims and purposes for which it was organized have remained the same. In 2003, with the resignation of the Executive Secretary, the Executive Committee evaluated the structure of LSI officers and determined that with membership declining it was no longer necessary to have two vice presidents. In November 2003, the Board of Governors voted to eliminate the position of Second Vice President and create the position of Vice President. The duties of the Second Vice President were added to the duties of the Vice President and other members of the Executive Committee.

In 2006, the governors discussed changing the name of the corporation. The ad hoc committee appointed by the LSI President consisting of Mary S. Rocca, CCLS, of Alameda County LPA, Cheryl Ewing of Capitol City LPA, and Cindy Gardner of Ventura County LPA recommended the corporation keep its name on an internal level, but instead use the acronym "LSI" for marketing purposes with an addition of a tag line. The governors voted in 2007 to use the tag line "Educating California's Legal Professionals" as its name for marketing purposes. The governors voted in 2014 to use a new tag line, "Educating California's Legal Support Professionals" as its name for marketing purposes.

In August 2016, LSI made history with the election of its first male officer, Rod Cardinale, Jr., of Santa Clara County Legal Professionals Association, to the office of LSI Treasurer.

Much credit goes to Eula Mae Jett and to Evelyn Atwood, who were characterized in bygone years as "founder" and "mother" respectively.

The Executive Advisor will update the history of LSI to reflect significant events that took place during her or his term of office as President of LSI.

CALIFORNIA ASSOCIATIONS

Listed below are the names of the associations which were members of Legal Secretaries, Incorporated, as of fiscal year 2015 - 2016, together with the years in which their charters were issued.

| <u>Chartered</u> | <u>Association</u> |
|-------------------------|--|
| 1934 | Long Beach |
| 1934 | Los Angeles |
| 1934 | San Diego |
| 1936 | San Francisco |
| 1936 | Alameda County |
| 1938 | Fresno County (formerly Fresno) |
| 1938 | Santa Barbara |
| 1938 | Ventura County |
| 1940 | Santa Clara County (formerly San Jose) |
| 1940 | Stockton-San Joaquin County (formerly Stockton) |
| 1941 | Sacramento |
| 1946 | Stanislaus County |
| 1948 | Beverly Hills/Century City (formerly Beverly Hills) |
| 1949 | San Fernando Valley |
| 1949 | San Gabriel Valley |
| 1949 | Rio Hondo District |
| 1949 | Orange County |
| 1949 | Riverside (formerly Riverside County) |
| 1953 | Desert Palm (withdrew 1954, rechartered 1961, withdrew 1982, rechartered 1996) |
| 1953 | Antelope Valley (withdrew 1959; chartered as Los Angeles County Antelope Valley in 1964, changed back to Antelope Valley LSA in 1996) |
| 1955 | Marin County |
| 1956 | Sonoma County |
| 1960 | Santa Cruz County (formerly Santa Cruz) |
| 1966 | Imperial County |
| 1966 | San Mateo County |
| 1967 | Placer County (withdrew then rechartered in 1980) |
| 1969 | Mt. Diablo |
| 1970 | Napa County |
| 1971 | Humboldt County |
| 1971 | Santa Maria (formerly Santa Maria-Lompoc) |
| 1976 | Livermore-Amador Valley |
| 1978 | Trinity County |
| 1981 | Southern Butte County |
| 1982 | Merced County |
| 1987 | Conejo Valley |
| 1992 | El Dorado County |
| 2016 | Contra Costa County |

Charters were issued in the years indicated to the following associations which are no longer active.

| <u>Chartered</u> | <u>Association</u> |
|-------------------------|---|
| 1939 | Bakersfield - withdrew 1982; rechartered 1996; withdrew 2004 |
| 1947 | San Bernardino - dissolved 1997 |
| 1948 | Glendale-Burbank (formerly Glendale, reactivated in 1992) - dissolved 2001 |
| 1949 | Inglewood (name changed to Los Angeles County, Southwest District |
| 1949 | Santa Monica) - withdrew 1968 |
| 1950 | Madera County - disbanded 1956; Charter reissued in 1973; withdrew 1980 |
| 1950 | Kings County - suspended 1992 |
| 1950 | Los Angeles County, Southeast District (formerly Inglewood) - disbanded 1997 |
| 1951 | South District (name changed to Compton District, merged with Southeast District) - disbanded 1961 |
| 1952 | Butte County -dissolved in 2015 |
| 1952 | Pomona Valley (changed to Pomona Valley Citrus 1972) - withdrew 1982 |
| 1950 | Tulare County - dissolved 2006 |
| 1954 | Contra Costa - dissolved in 2007 |
| 1956 | Contra Costa County, Second District - withdrew 1965 |
| 1956 | Mendocino County - withdrew 1957; reissued 1964 - withdrew 1974 |
| 1959 | Shasta County - withdrew 1967 |
| 1959 | Ontario, formerly Ontario-Upland-Chino - withdrew 1987 (rechartered as Ontario Inland Valley in 1994) - dissolved 2000 |
| 1960 | Nevada County - dissolved 2002 |
| 1960 | Southern Alameda County - dissolved 2003 |
| 1961 | Monterey County – revoked 2015 |
| 1962 | San Bernardino County, Second District - withdrew 1965 |
| 1963 | Plumas-Sierra Counties - suspended 1965 |
| 1963 | Northern San Diego County - dissolved in 2007 |
| 1963 | Los Angeles County - South Bay District - dissolved in 2007 |
| 1964 | San Luis Obispo County - dissolved in 2007 |
| 1965 | Glenn-Colusa Counties - dissolved 2002 |
| 1967 | Orange County, Harbor Area - withdrew 1988 |
| 1967 | Pasadena - dissolved 1985 |
| 1968 | Solano County - dissolved in 2006 |
| 1972 | Yolo County - withdrew 1975 |
| 1973 | Indio Desert Oasis - withdrew 1988 |
| 1973 | Redding – revoked 2015 |
| 1977 | Palo Alto – dissolved 2014 |
| 1979 | Los Angeles County, Santa Clarita Valley - withdrew 1982 |
| 1979 | Gilroy-Hollister - Morgan Hill (Gilroy-Morgan Hill) - dissolved 2000 |
| 1988 | Newport Beach - dissolved 1999 |
| 1988 | Tri-County (split into Tuolumne County and Amador/Calaveras in 1991) |

Chartered Association

| | |
|------|--|
| 1988 | Tahoe-Truckee - dissolved 1991 |
| 1988 | Mt. San Jacinto - dissolved 1993 |
| 1989 | East Kern County - dissolved 1996 |
| 1989 | Sutter-Yuba - dissolved 2004 |
| 1991 | Amador/Calaveras - dissolved 1999 |
| 1991 | Tuolumne County - dissolved 2004 |
| 1991 | Lompoc/Santa Ynez Valley - dissolved 1993 |
| 1992 | Del Norte County - dissolved 1998 |
| 1992 | Siskiyou County - dissolved 2006 |
| 1993 | San Diego-Golden Triangle - dissolved 1996 |
| 1997 | Tehama County - dissolved 2003 |
| 1994 | Capitol City – dissolved 2013 |

PAST PRESIDENTS

| | |
|---|-----------|
| *Louise B. Cord, San Diego LSA | 1934-1936 |
| *Ruth Bauchet, Long Beach LSA | 1936-1938 |
| *Leta Lyle Niccum, Los Angeles LSA | 1938-1940 |
| *Lillian Wollitz, San Francisco LSA | 1940-1942 |
| *Mildred Drost, Alameda County LSA | 1942-1944 |
| *Mabel Reynolds, Santa Barbara LSA | 1944-1946 |
| *Velma Tougaw, Sacramento LSA | 1946-1948 |
| *Evelyn Atwood, Los Angeles LSA | 1948-1950 |
| *Molly Poole (Lauck), Fresno LSA | 1950-1951 |
| *Elsie Riner, Bakersfield LSA | 1951-1953 |
| *Gloria Soares (Massi), Sacramento LSA | 1953-1955 |
| *Jean Hecker, Los Angeles LSA | 1955-1957 |
| *Margaret Wolfe (Hudson), San Bernardino LSA | 1957-1958 |
| Bernice Tabbert, PLS, Stanislaus County LSA | 1958-1960 |
| Patricia S. Brady, PLS, CCLS, Beverly Hills LSA | 1960-1962 |
| *Kathryn Wright, Contra Costa County LSA | 1962-1963 |
| *Arleen Neuhs, Southeast District LSA | 1963-1964 |
| *Helen Harney (Crittenden), Stockton LSA | 1964-1966 |
| *Gladys W. Plato, Los Angeles LSA | 1966-1967 |
| Lucille M. Thornton, San Fernando Valley LSA | 1967-1968 |
| *Bette Barton, Kings County LSA | 1968-1970 |
| *Ivy W. Person, Bakersfield LSA | 1970-1972 |
| Betty Lou West, San Francisco LSA | 1972-1974 |
| Dee Downs (Buzzard), San Fernando Valley LSA | 1974-1976 |
| Patricia A. Greene, Pasadena LSA | 1976-1978 |
| Suzanne M. Allen PLS, CCLS, Santa Barbara LSA | 1978-1980 |

Past Presidents (Continued)

| | |
|--|-----------|
| *Joan M. Moore, PLS, CCLS, Stockton-San Joaquin Co. LSA | 1980-1982 |
| *Rhoda C. Spencer, PLS, CCLS, San Diego LSA | 1982-1984 |
| Diana E. Estabrook, PLS, CCLS, Sonoma Co. LSA | 1984-1986 |
| Joyce I. Seymour, PLS, CCLS, San Francisco LSA | 1986-1988 |
| *Patricia A. Parson, Alameda County LSA | 1988-1990 |
| Caroline E. Van De Pol, PLS, CLA/CAS, CCLS, Santa Clara County LSA | 1990-1992 |
| Cheryl Woodson, CCLS, Long Beach LSA | 1992-1994 |
| Linda Duarte, Long Beach LSA | 1994-1996 |
| Deanna A. Pepe, CCLS, PLS, Beverly Hills/Century City LSA | 1996-1998 |
| Patricia E. Miller, PLS, CCLS, Santa Cruz County LPA | 1998-2000 |
| Yvonne Waldron-Robinson, CCLS, San Francisco LPA | 2000-2002 |
| Kay J. Thornburg, San Diego LSA | 2002-2004 |
| Mary S. Rocca, CCLS, Alameda County LSA | 2004-2006 |
| Lorraine Bettencourt, PLS, CCLS, Merced County LPA | 2006-2008 |
| Christa Davis, Livermore-Amador Valley LPA | 2008-2010 |
| Brooke Mansfield, CCLS, Butte County LPA | 2010-2012 |
| Sandra T. Jimenez, CCLS, Imperial County LPA | 2012-2014 |
| Mary J. Beaudrow, CCLS, Mt. Diablo LPA | 2014-2016 |

*Deceased

HONORARY MEMBERS

Throughout its existence, Legal Secretaries, Incorporated, has been the recipient of many favors and outstanding services. To express its appreciation, the Board of Governors has from time to time voted to elect to honorary membership in this association those individuals who were responsible for such contributions. The names of those persons and the years in which they were elected are as follows:

| | |
|--------------------------------|------|
| *The Honorable B. Rey Schauer | 1948 |
| *The Honorable Emmet H. Wilson | 1948 |
| *Eula Mae Jett | 1949 |
| *Inez Ingram | 1949 |
| *Stuart F. Cooper | 1952 |
| *Robert M. Parker | 1961 |
| * Harold F. Bennett | 1962 |
| Patricia S. Brady, PLS | 1967 |
| *George S. Pratt | 1967 |
| Jack Lamp | 1968 |
| *Golda J. Cooper | 1969 |
| *Robert J. Brady | 1972 |
| William E. Brown | 1972 |

Honorary Members (Continued)

| | |
|---------------------|------|
| Fred George | 1974 |
| *Ada M. Walsh | 1974 |
| Richard M. Fowler | 1975 |
| *Helen A. Wright | 1979 |
| *Mertie M. Yinger | 1984 |
| Henry Scarpelli | 1984 |
| Steven Daitch | 1990 |
| George M. Allen | 1994 |
| Carl R. Brown | 1995 |
| *Jack Janney | 1997 |
| *Sharon Irish, CCLS | 2007 |
| *Kalman Zemplyny II | 2009 |
| Don Lee | 2011 |
| *Deceased | |

ARTICLES OF INCORPORATION
OF
LEGAL SECRETARIES, INCORPORATED

KNOW ALL MEN BY THESE PRESENTS:

That the undersigned have this day associated ourselves together for the purpose of forming a corporation under the laws of the State of California.

AND WE HEREBY CERTIFY:

FIRST: That the name of this corporation is

LEGAL SECRETARIES, INCORPORATED

SECOND: That this corporation does not contemplate pecuniary gain or profit to its members.

THIRD: That the purposes for which said corporation is formed are:

To incorporate the existing unincorporated California Federation of Legal Secretaries.

To promote feelings of mutual good will and harmony between the various individual associations of legal secretaries and to unite in one body all legal secretaries associations.

To cooperate with the various Bar Associations.

To secure combined and expeditious action among the legal secretaries associations.

To stimulate the growth of legal secretaries associations and the education of its members.

To charter legal secretaries associations.

To foster mutual helpfulness among members of the legal secretaries associations.

To promote the interests of employees of legal offices and courts.

To provide a medium under which any member association or group of member associations may at any time present suggestions or inquiries in the interest of mutual benefit to the legal secretaries comprising the associations.

To correlate activities of chartered groups of legal secretaries.

To encourage social activities among its members.

To adopt a Code of Ethics for legal secretaries and to provide for the enforcement of such Code of Ethics by its Bylaws.

To possess and exercise all rights and powers not prohibited non-profit corporations by the law.

Generally, to do any and all things necessary, convenient, advisable, suitable and proper for the accomplishment of any of the purposes or the attainment of any of the objects or the furtherance of any of the powers of this corporation; provided the same is not inconsistent with laws under which this corporation is organized.

FOURTH: The County in this State where the principal office for the transaction of the business of the corporation is to be located in the County of Los Angeles.

FIFTH: That the number of its directors who shall be designated as Governors, shall be eleven; provided, however, that this corporation may increase or decrease the number of its directors by bylaws or amendments thereto, provided, however, that there shall be no less than three; and that the names and addresses of the Governors who are appointed to act as such Governors until the selection and qualification of their successors, are as follows:

| <u>Name</u> | <u>Address</u> |
|-------------------|--|
| Edna High | 714 Heartwell Building Long Beach, California |
| Rosa True | 1100 Hall of Records Los Angeles, California |
| Ottolie Wendel | 909 First National Bank Building San Diego, California |
| Louise Watters | 860 Waller Street San Francisco, California |
| Mary Q. Lilinthal | 914 Easton Building Oakland, California |
| Bernell Warren | Court House, c/o County Clerk Santa Barbara, California |

Helen Drennan 814 Pacific Southwest Building
Fresno, California

Beth Baker 404 Haberfelde Building
Bakersfield, California

Emlyn Dahlberg 91 Grant Building
San Jose, California

Myrna I. May 306 Bank of America Building
Ventura, California

Lyla Warren Belding Building
Stockton, California

SIXTH: The number and qualifications of members, the different classes of membership, if any, the property, voting and other rights and privileges, the duties and the liabilities of each or all classes of members, shall be as set forth in the Bylaws of this corporation.

SEVENTH: That the name of the existing unincorporated association, which is being incorporated, is California Federation of Legal Secretaries.

EIGHTH: That these articles of incorporation may be amended or the name of the corporation changed or the principal place of business changed in any manner prescribed by law, and in the absence of any provision in law prohibiting such change, then a resolution of the Board of Governors and approval of two-thirds of the member associations shall be sufficient authorization.

IN WITNESS WHEREOF said incorporators have hereunto set their hands and seals this 5th day of May, 1940.

LETA NICCUM, President
HELEN STEELE, Executive Secretary

Leta Niccum and Helen Steele, individually, each for herself, being first duly sworn, deposes and says:

BENEFITS

CREDIT UNION

In 1962, during Kathryn Wright's term of office, a Credit Union for the benefit of members of Legal Secretaries, Incorporated, was organized by five members of the Riverside Legal Secretaries Association. In January 1963, the Credit Union was in operation with Mertie Yinger as Manager and the organizers acting as the Board of Directors, all serving without compensation. The Credit Union quickly outgrew the initial office (a corner of a dining room) and ultimately had a three-room office with two employees in addition to the manager, as well as assets of approximately one half million dollars.

Rapidly increasing dividends paid by other financial institutions made it impossible for a small Credit Union to survive and in 1979 it was merged with San Bernardino County Central Credit Union. During the entire 16 years of its existence, Mertie Yinger acted as Manager.

In 1986, LSI was approved as an association sponsor of the Provident Central Credit Union and withdrew its sponsorship in the San Bernardino County Central Credit Union.

BLOOD BANK

In 1968, President Lucille M. Thornton appointed Maurean McGuckin, Los Angeles County, Southwest District Legal Secretaries Association, chairman of the newly-created Blood Bank Program, which was to operate in conjunction with the American Red Cross. Subsequently a co-chairman was appointed for the northern part of the state.

This project was undertaken for the benefit of members of Legal Secretaries, Incorporated, and their families. Efforts were made to coordinate donations of and requests for blood, all of which involved considerable record keeping. Because of difficulties encountered in administration, this worthwhile program, which proved to be beneficial to many members, was terminated in 1977. This project was reactivated in 1985 during the presidency of Diana E. Estabrook, PLS, CCLS, under the guidance of LSI's Benefits Chairman. It is currently not an active LSI program.

INSURANCE

Over the years, Legal Secretaries, Incorporated, has sought to provide group insurance for its members, with a particular view towards those who are employed in offices with no insurance plan. Many plans were presented and considered, and in 1959 a master group plan proposed by Washington National Insurance Company was approved. Currently, a disability income plan, a major medical plan, a cancer care plan, an intensive hospital care plan and an IRA pension plan are available to members of Legal Secretaries, Incorporated.

In 2011, Legal Secretaries, Incorporated welcomed MWG Financial & Insurance Services as a benefits provider.

HERTZ RENT-A-CAR

In the early 1990s, Legal Secretaries, Incorporated entered into an agreement with Hertz Corporation, whereby a special rate for car rentals was provided to LSI members. In addition, a percentage of the revenue generated by such rentals were rebated back to Legal Secretaries, Incorporated.

MAGIC KINGDOM CLUB

In the late 1990s, Legal Secretaries, Incorporated became a member of Disneyland's Magic Kingdom Club, which entitled LSI members to receive special discount entry rates at Disneyland theme parks and special discount prices at Disney stores. In 2000, the name of the benefit was changed to Disney Club. Effective December 2003, The Disney Club was discontinued.

WORKING ADVANTAGE

In 2008, the members were offered an opportunity to join Working Advantage and obtain discount rates to events, retail stores, etc.

CALIFORNIA CERTIFIED LEGAL SECRETARY (CCLS)

In May 1986, an ad hoc committee was appointed to study the feasibility of a California certification program. In November 1986, the California Certified Legal Secretary (CCLS) program was approved and by February 1987, the CCLS Certifying Board was appointed. The first CCLS Certifying Board consisted of Rosa Frank, CCLS, of Beverly Hills/Century City LSA, as chairman; Alan Mund, sole practitioner of Los Angeles; Dennis Kahane of Pillsbury, Madison and Sutro; Patricia Miller, PLS, CCLS, of Santa Cruz County LSA; Judy Choate, CCLS, of Alameda County LSA; Diane Beaver, CCLS, of Stockton-San Joaquin County LSA; Peggy Vota, professor, City College of San Francisco; and Marie Zenker, CCLS, of San Diego LSA. Rules were established for grandfathering in the current PLSes. In 1987, a logo contest was held with the winning design being a composite of entries by Linda Duarte and Judy Wagner-Estrin. In 1988, a contract with Martha Brumbaugh, marketing consultant was signed. LSI also purchased a computer to maintain the confidentiality of the exam and applicant list.

The first examination was offered in March 1989. In May 1989, 152 PLSes were grandfathered in as CCLSes. Rules were established for the continuing education of CCLSes requiring 15 hours of approved education within three years and in May 1992, 187 CCLSes were recertified.

The CCLS examination is an all-day examination given twice a year in March and October in Los Angeles and San Francisco covering the following subjects: Ability to Communicate Effectively; Legal Computation; Reasoning and Ethics; Legal Terminology; California Legal Procedure; Skills; and Law Office Administration.

The CCLS logo is only to be used by the CCLS Certifying Board or those who have become certified as CCLSeS.

In May 1989, the successful CCLSeS were awarded a portion of the scholarship fund presented by Advocate Legal Services. In 1992, Legal Directories Publishing Company sponsored a \$1,500 annual scholarship to be given to the successful CCLSeS for the current year.

The first mock exam was prepared by Rosa Frank, CCLS, in 1989. Thereafter, the Continuing Education Council (CEC) prepared a more comprehensive mock exam, which was first available in 1990, and additional editions were printed in 1998 and 2000. In 1992, the CEC started preparation of a Study Guide to assist those who wish to study for the CCLS examination. In 1996, the CEC developed a Study Kit for its members' use, which contained the Mock Exam, a disk and study kits.

In 1990, the CCLS Mock Exam was dedicated in the memory of Virginia Haines, PLS, CCLS. In 1992, the CCLS Certifying Board added the opportunity for applicants who pass a minimum of four sections at one sitting to retake the remaining three or fewer sections at the next examination. In 2012, the CCLS Mock Exam was renamed to the CCLS Study Guide.

In September of 2008, the CCLS Chair, Astrid Watterson, CCLS, of Sacramento LSA held a 23-week statewide study group. Eleven local associations participated in the study group, and received lesson plans and testing materials from the CCLS Chair. This statewide study group was continued again during the 2009-2010 fiscal year.

In August 2013, the CCLS Chair, Terrie Quinton, CCLS, of San Diego LSA, commenced an 8-week online CCLS study class, with the class to be held twice a year prior to each exam. The exams are held in October and March of each year.

CHAPTER ACHIEVEMENT AWARD CONTEST

In 1972, during Ivy Person's term, a Chapter Achievement Award Contest was established. The purpose of this project was to encourage local association participation at the state and national levels. Points are given for activities during the fiscal year in certain designated categories.

Entry forms are provided each local association, which are to be completed and returned to the Vice President of Legal Secretaries, Incorporated, who is in charge of this contest. Monetary awards are given at annual conference to the winners in the various groups, the group into which each association falls being based upon its total membership.

Golda J. Cooper, of Stuart F. Cooper Co., passed away in 1989. Because of her dedication to LSI and the contribution of Stuart F. Cooper Co. through the Chapter Achievement Contest, the contest was renamed the "Golda J. Cooper Chapter Achievement Contest."

In 1992, a category on the Golda J. Cooper Chapter Achievement Contest was added encouraging local associations to sponsor charitable projects.

The following is the story of Golda J. Cooper, as presented by Monte Justesen, President of Stuart F. Cooper Company, at the 1997 Annual Conference:

Golda Marie Justesen was born on January 8, 1903, in Audubon, Iowa. She was the only child of Christina and Just Justesen who were both immigrants from Denmark. The family moved to Reedley, California, a small farm town southeast of Fresno, shortly after her birth. She attended Reedley schools and moved to Los Angeles to attend Woodbury College. She married Stuart F. Cooper in 1928. So, Golda Marie Justesen became Golda J. Cooper. They had one child, Susan Frances, who was born in 1933 and passed away in 1975.

Stuart F. Cooper was the son of Milton G. Cooper, who owned a very large wholesale clothing business. The Milton G. Cooper Company catered to the old southern California firms that have since disappeared - Broadway, Bullocks, Buffums and Robinsons. The only remnant of the Milton G. Cooper Company is the Cooper Building in the downtown Los Angeles garment district.

Golda and Stuart co-founded the Stuart F. Cooper Company in 1929; a very good year to start a business. Needless to say, they struggled during the depression and relied on old friends for business and there was Broadway, Bullocks, Buffums and Robinsons, not to forget Jorgensen Steel, Byron Jackson Pumps and Purex whose founder, Adrian Pelletier, went to business school with Golda. The war years were rough primarily because of paper rationing, but by 1947 the company had bought some engraving presses and decided to look into the legal market. Harold Bennett, who worked for the company for 47 years, was instrumental in pointing the company to the legal profession. By the early 1950s, Stuart F. Cooper had heard of a group of legal secretaries that he thought would be a good organization to support. Well, there was an employee named Jack Lamp who worked for the company and that is when it all started.

On February 14, 1958, Stuart F. Cooper passed away. Shortly after his death, Golda returned to the company. Jack Lamp continued to represent the Stuart F. Cooper Company at Legal Secretaries functions, but Golda decided to become active also; and active she was. By the early 1960s, she was attending conferences, board of governors meetings and going to business meetings, seminars and installations as if she were a voting member. She was an ardent supporter and she made genuine friends with the membership. She loved to party and have fun. She never lacked enthusiasm and was active into her 80s. Golda loved to correspond and never forgot to write a thank you note. Those of you who received her letters know that reading them was like having her in the room with you. They were alive. She was an honorary member of LSI and received many proclamations from the local associations. Jack Lamp left the company after 25 years of service in 1972. The following years, Golda was assisted by Dick Fowler, who worked for the company for 40 years; Bob Paskus who became president of the Stuart F. Cooper Company; Art Prosser, who was the son of a long-time member, Frances Prosser; and Monte Justesen.

Golda's last conference was in Fresno in 1987. She was 84, had had a stroke, and was in a wheelchair, but that didn't stop her. She had over 20 good years supporting LSI and loved the organization and its members. She continued her friendships until she passed away on December 22, 1989.

So now you know the story of Golda J. Cooper and, in her memory, the Chapter Achievement Contest will continue to be remembered in her spirit.

In 2013, Stuart F. Cooper Company stopped funding the Golda J. Cooper Chapter Achievement Contest and LSI currently funds the contest.

CODE OF ETHICS

At a meeting of the Board of Governors of California Federation of Legal Secretaries on December 8, 1934, the following Code of Ethics composed by Evelyn Atwood was considered and adopted:

The first duty of a legal secretary is loyalty to her employer.

It shall be the duty of every legal secretary to maintain at all times a high standard of courtesy in all contacts with law offices, clients, courts and any and all persons.

It shall be unethical for any legal secretary to violate any statute now in effect or to be enacted governing privileged communications.

It shall be unethical for any secretary or employee of any law office to divulge

the contents of any documents in the possession of her employer without first having obtained the consent of said employer, or to discuss, maliciously or otherwise, with any person, matters of a confidential nature, knowledge of which may come to her by virtue of her employment.

It shall be the duty of every legal secretary to maintain harmonious cooperation with her associates.

Each member of Legal Secretaries, Incorporated, and the National Association of Legal Secretaries agreed to be bound by the foregoing Code of Ethics, which remained in effect until 1976. During that period, circumstances arose which prompted consideration of a revised Code of Ethics, e.g., male members objected to the use of the feminine pronoun and many members felt that the Code of Ethics should be somewhat more affirmative.

At the annual convention of the National Association of Legal Secretaries in Denver in July 1976, a committee, of which Ivy W. Person, of Bakersfield, California, was chairman, presented a new Code of Ethics for consideration. The following version was adopted and became binding upon all members:

Members of the National Association of Legal Secretaries (International) are bound by the objectives of this Association and the standards of conduct required of the legal profession. Every member shall:

Encourage respect for the law and the administration of justice; observe rules governing privileged communications and confidential information;

Perform all duties of the profession with integrity and competence;
Promote and exemplify high standards of loyalty, cooperation and courtesy;
and Pursue a high order of professional attainment.

Because of the action taken by the Board of Governors at the November 1981 meeting to withdraw from the National Association of Legal Secretaries, it became necessary to adopt a new Code of Ethics. A committee comprised of Virginia G. Haines, PLS, Chairman (San Francisco LSA), Helen Kouns (Alameda County LSA) and Bonnie Bustad (Ventura County LSA) was appointed to draft such a Code and at the February 1982 Board of Governors meeting the following Code of Ethics was adopted:

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.

By order of the vote of the Board of Governors, the Code of Ethics of Legal Secretaries, Incorporated was dedicated to the memory of Joan M. Moore, PLS, LSI President 1980-1982.

CONVENTIONS/ANNUAL CONFERENCES

The annual meetings of the Federation and Legal Secretaries, Incorporated, have always been held in May, with each local association entitled to three delegates. In the early days, there was almost always 100 percent representation despite the fact that neither the local associations nor Legal Secretaries, Incorporated, had funds to pay expenses of those attending.

The convention was scheduled for Saturday and Sunday and at least in one year (1944) the convention did not open until 3:30 p.m. on Saturday to accommodate delegates unable to arrive earlier. Soon, the entire day on Saturday was devoted to meetings and most delegates arrived at the convention city on Friday evening. In 1968, when the convention was held at Monterey, for the first time a workshop was scheduled for Friday afternoon. Since then, the convention has events scheduled for Friday morning, Friday afternoon and Friday evening, with the actual business of the convention getting underway on Saturday morning. Beginning in 1975, a newcomers event has been held at each convention.

In 1938, at Long Beach, when there were only seven local associations, approximately 300 people attended both the banquet and the brunch. The banquet has traditionally been a large, festive affair, except for World War II years when travel was curtailed and hotel accommodations were almost non-existent. Guests of honor at some of the early conventions included: Lieutenant Governor George J. Hatfield, Governor Culbert L. Olson, and Acting Governor Goodwin J. Knight. In 1959, Perry Mason and Della Street highlighted the banquet at the convention in Stockton. The keynote speaker at the 1981 convention was Robert Raven, President of the State Bar of California.

In 1989, the rules were changed concerning the Resolutions Committee. Only a chairman was appointed for the 1990 Convention. In 1992, the duties of the Resolutions Chairman was taken over by the Executive Secretary and the Resolutions Committee was eliminated.

Effective 1991, the term "Convention" was changed to "Annual Conference." Listed below are the years, places and names of the hostess associations for the Annual Conferences.

| <u>Year</u> | <u>Location</u> | <u>Hosting Association</u> |
|--------------------|------------------------|-----------------------------------|
| 1935 | San Diego | San Diego |
| 1936 | Santa Monica | Los Angeles |
| 1937 | San Francisco | San Francisco |
| 1938 | Long Beach | Long Beach |
| 1939 | Oakland | Alameda County |
| 1940 | Los Angeles | Los Angeles |

| <u>Year</u> | <u>Location</u> | <u>Hosting Association</u> |
|--------------------|------------------------|-----------------------------------|
| 1941 | San Jose | San Jose |
| 1942 | Fresno | Fresno |
| 1943 | Santa Barbara | Santa Barbara |
| 1944 | San Jose | San Jose |
| 1945 | Pasadena | Los Angeles |
| 1946 | Sacramento | Sacramento |
| 1947 | Bakersfield | Bakersfield |
| 1948 | San Diego | San Diego |
| 1949 | San Jose | San Jose |
| 1950 | Long Beach | Long Beach |
| 1951 | Fresno | Fresno |
| 1952 | San Francisco | San Francisco |
| 1953 | Los Angeles | Los Angeles |
| 1954 | Sacramento | Sacramento |
| 1955 | San Diego | San Diego |
| 1956 | Bakersfield | Bakersfield |
| 1957 | San Jose | San Jose |
| 1958 | Santa Barbara | Santa Barbara |
| 1959 | Stockton | Stockton |
| 1960 | Long Beach | Long Beach |
| 1961 | Fresno | Fresno |
| 1962 | Beverly Hills | Beverly Hills |
| 1963 | Santa Barbara | Santa Barbara |
| 1964 | Sacramento | Sacramento |
| 1965 | Anaheim | Orange County |
| 1966 | Lake Tahoe | Stockton |
| 1967 | Los Angeles | Los Angeles |
| 1968 | Monterey | Monterey County |
| 1969 | San Diego | San Diego |
| 1970 | Bakersfield | Bakersfield |
| 1971 | Burlingame | San Mateo County |
| 1972 | Long Beach | Long Beach |
| 1973 | Fresno | Fresno |
| 1974 | San Francisco | San Francisco |
| 1975 | Newport Beach | Orange County Harbor Area |
| 1976 | San Jose | San Jose |
| 1977 | Reno | Stockton-San Joaquin County |
| 1978 | Anaheim | Orange County |
| 1979 | San Diego | Northern San Diego County |
| 1980 | Santa Monica | Beverly Hills |
| 1981 | Sacramento | Sacramento |
| 1982 | San Diego | San Diego |
| 1983 | Los Angeles | Beverly Hills |

| <u>Year</u> | <u>Location</u> | <u>Hosting Association</u> |
|-------------|-----------------|---|
| 1984 | Long Beach | Long Beach |
| 1985 | San Bernardino | San Bernardino |
| 1986 | San Francisco | San Francisco |
| 1987 | Fresno | Fresno County |
| 1988 | Oakland | Alameda County |
| 1989 | Redding | Redding/Trinity County |
| 1990 | San Jose | Santa Clara County |
| 1991 | Sacramento | Sacramento |
| 1992 | Newport Beach | Newport Beach |
| 1993 | Oakland | Alameda County |
| 1994 | Long Beach | Long Beach |
| 1995 | San Diego | San Diego |
| 1996 | Culver City | Beverly Hills/Century City |
| 1997 | Universal City | San Fernando Valley |
| 1998 | Oakland | Alameda County |
| 1999 | Monterey | Santa Cruz County |
| 2000 | San Francisco | San Francisco |
| 2001 | Sacramento | Capitol City |
| 2002 | San Diego | San Diego |
| 2003 | Anaheim | Orange County |
| 2004 | Oakland | Alameda County |
| 2005 | Santa Clara | Santa Clara County |
| 2006 | Modesto | Merced County |
| 2007 | Palm Springs | Desert Palm |
| 2008 | Pleasanton | Livermore-Amador Valley |
| 2009 | Long Beach | Long Beach (75 th Anniversary) |
| 2010 | Sacramento | Sacramento and Butte County |
| 2011 | Los Angeles | Los Angeles |
| 2012 | San Diego | San Diego and Imperial County |
| 2013 | San Jose | Santa Clara County |
| 2014 | Concord | Mt. Diablo |
| 2015 | San Diego | San Diego |
| 2016 | Santa Rosa | Marin County and San Francisco |

CORPORATE OFFICE

It was concluded that the establishment of a central office would fill a need of Legal Secretaries, Incorporated. In May 1977, Sharon Baker Eastman, a former member of Contra Costa County LSA, was engaged as part-time Administrator and such an office was set up in her home until her resignation in 1982.

With the purchase of a new photocopier for Corporate Office, LSI was given two Memory Writer typewriters--one for the President to use and one for the Executive Secretary. With the advent of computers, the use of the typewriters has lessened and they were donated to charitable organizations.

Joy Carleton, a former member of Riverside LSA, was selected as LSI's second Administrator, and the office was relocated to 4807-A Jackson Street, Riverside, California. During the presidency of Rhoda C. Spencer, PLS, CCLS, negotiations were commenced for LSI to enter into an independent contractor agreement with LSI's Administrator, and the contract was formalized on May 2, 1983.

The office serves as a place for the safekeeping of the records and supplies of the corporation. The membership list, formerly under the duties of the Registrar, is now maintained and updated by the Administrator. Other duties include reproducing and processing the directives and reports of all LSI officers and chairmen and the dissemination of all membership inquiries to the appropriate local associations.

Joy Carleton continued to serve as Administrator until 1989, when she retired. An announcement was made for a replacement administrator. The Executive Committee interviewed the candidates, and in November 1989, Sharon R. Irish, CCLS, an honorary member of Beverly Hills/Century LSA, became the third Administrator. The LSI Administrator's office was moved to 12842 Hortense Street, Studio City, California.

In August 1999, the Governors approved the expenditure to convert the database at Corporate Office from Profile DOS to Microsoft Access.

Sharon R. Irish retired as LSI Administrator effective April 30, 2007. An announcement was again made for a replacement administrator, and applications were forwarded to independent administrators throughout the state. The members of the Executive Committee interviewed the candidates, and in February 2007, Catherine Culver, CCLS, a member of Humboldt County LPA, became LSI's fourth administrator. The LSI Administrator's office was moved to 1150 Vista Drive, Fortuna, California. In 2011, the LSI Administrator requested to be deemed an employee instead of an independent contractor. The Executive Committee researched the matter and hired an attorney. It was decided that the duties performed by the LSI Administrator were those of an employee, and thus the LSI Administrator was deemed an employee. In order to avoid having to calculate payroll taxes and insurance, Legal Secretaries, Incorporated contracted with Robert Half International to handle all payroll and insurance issues pertaining to the LSI Administrator.

In 2012, LSI goes green and the LSI Administrator no longer collates packets for conferences for Governors, Officers and Chairmen. All directives, reports and agendas are posted on the LSI website seven (7) days before conference. All Governors, Officers and Chairmen are required to download and review all information in advance of conference to prepare any comments and/or motions for smoother flow of business.

Catherine Culver, CCLS, retired as LSI Administrator effective June 15, 2015. An announcement was sent out for a replacement administrator, and applications were forwarded to independent administrators throughout the state. The members of the Executive Committee interviewed candidates for the position of LSI Administrator, and with the approval of the governors at the Post-Board of Governors meeting in May 2015, California Advocates Management Services entered into a contract to be LSI's fifth administrator. The LSI Administrator's office was moved to 2520 Venture Oaks Way, Suite 150, Sacramento, California.

DICTIONARY FOR SECRETARIES

In a search for some appropriate fund-raising plan, the compilation and publication of a legal secretary's dictionary was proposed and a committee was appointed to investigate the feasibility of such an undertaking. In 1964, the Board of Governors approved the proposal and Virginia G. Haines, PLS, of San Francisco, was appointed editor.

A list of frequently used words was chosen and distributed among eighteen members of Legal Secretaries, Incorporated, who had agreed to be of assistance. All of those participating were full-time legal secretaries and it took until 1971 before a compact, blue, hardbound book with gold lettering was off the press. It contained 7,735 words with clear, concise definitions and proper word division.

Substantial royalties were received by Legal Secretaries, Incorporated, from the sale of the dictionary. This project also served to enhance the image of Legal Secretaries, Incorporated, among the attorneys, judges and deans of law schools who had indicated that there was an urgent need for this type of publication.

In 1980, shortly after the *Legal Secretary's Resource* was first published by Parker & Son Publications, Inc., the Executive Committee elected to discontinue the publication of the dictionary because many of its terms were incorporated into the glossary sections of the *Legal Secretary's Resource* (now *Law Office Procedures Manual*).

In 2002, the Publications Revision Committee began the task of recreating the Dictionary for Legal Secretaries; however, the project has been put on hold.

EDUCATIONAL PROGRAMS

The primary purpose for forming the legal secretaries association was to keep legal secretaries informed of current requirements for the preparation and filing of forms and pleadings. In this connection, various types of educational programs have been sponsored and undertaken.

LEGAL SECRETARIAL TRAINING COURSE

Originally known as the Student Guidance Course, in 1954 the name was changed to Legal Secretarial Training Course. The State Chairman worked with and encouraged local associations to sponsor and conduct training courses for the benefit of their members and other legal secretaries in the community. *A Curriculum For Training of Prospective Legal Secretaries* was adopted by the Board of Governors and copyrighted in 1951. This was provided to local associations to assist them in conducting training courses. Certificates of completion issued by Legal Secretaries, Incorporated were furnished. In 1990, the Certificates of Completion were changed to Certificates of Attendance. In 1969, a teaching guide was prepared and copyrighted for distribution to members qualified to teach such courses. This guide has been revised and updated, and in recent years workshops have been held at Board of Governors meetings to inform members how to establish and conduct a training course.

In 1978, a manual known as *Legal Secretary's Resource*, along with a guide for the instructor, was prepared for use with training courses. It contained court forms and other instruments with which a legal secretary should be familiar. Soon, there was a widespread demand for the *Resource* among secretaries in law offices. This has resulted not only in revenue for Legal Secretaries, Incorporated, but brought the expertise of its members to the attention of the legal profession. In 1990, the *Resource* was renamed the *Law Office Procedures Manual*.

EDUCATIONAL PROGRAM COORDINATOR

Over the years, efforts were made to present programs of an educational nature at Board meetings and Annual Conferences and these were well received by the members. It became apparent, however, that coordination was required to maintain quality programs. In 1974 Helen Wright, of Merced County Legal Secretaries Association, was appointed the first chairman of this program. She worked closely with the hostess associations and the program flourished.

The Educational Program Coordinator, now an appointed officer acts as chairman of the Continuing Educational Council, as well as liaison between the conference hosting association and Legal Secretaries, Incorporated. The Council selects the programs to be presented, taking into consideration suggestions from members as to what subjects should be covered and outstanding programs are presented. To aid in securing well-qualified speakers and the preparation of handout material, substantial sums have been authorized to defray expenses. These programs were discontinued in 2006 with a change in the conference schedule.

CONTINUING EDUCATION COUNCIL

Initially, the Continuing Education Council was comprised of the Educational Program Coordinator, the Editor and Assistant Editor of the *Legal Secretary's Handbook*, Editor of the *Legal Secretary's Resource*, the Continuing Education Seminar Chairman, and the Chairmen of Legal Procedure, Legal Secretarial Training, Professional Legal Secretary, and Professional

Liaison Committees, with the Second Vice President serving as liaison for Legal Secretaries, Incorporated.

In 1986, with the formation of the Publications Revision Committee, the chairmanship of Assistant Editor was discontinued.

The Council was established to provide comprehensive continuing education programs throughout California; to provide mutual assistance for the chairmen concerned with the various facets of education; to prevent duplication of efforts by the chairmen or neglect of any area of education; and to assist local associations in their educational endeavors.

In 1992, the Council was comprised of the Educational Program Coordinator, the Second Vice President as liaison with the Executive Committee, the CCLS Chairman, the Editor-in-Chief, the Legal Procedure Chairman, the Legal Secretarial Training/Seminar Chairman, the Legal Specialization Sections Coordinator, and the Professional Liaison. In November 1999, the Professional Liaison position was removed from the Council. Later, when the position of LSI Second Vice President was eliminated, the LSI Executive Advisor adopted the role of liaison to the Continuing Education Council.

In 2012, the Council established educational seminars scheduled on Friday evenings at every quarterly conference.

CONTINUING EDUCATION SEMINARS

In 1976, Legal Secretaries, Incorporated, entered a contract with the Extension Service of the University of California in a cooperative venture to present statewide quality continuing education for legal secretaries on a one-year trial basis. From 1977 to 1979, seminars were held at various locations throughout the state with the cooperation of local associations, Legal Secretaries, Incorporated, and the University.

By 1980, it was determined that attendance at these seminars did not warrant continued work with the University of California and Legal Secretaries, Incorporated embarked on its own continuing education program. Seminars have been, and are, held at various locations throughout California with the cooperation of local associations in the area. When the Legal Specialization Sections were formed, the seminars put on by the Continuing Education Council ceased, and in place thereof Spring and Fall Regional seminars were put on by the Legal Specialization Section Leaders throughout California at various locations. The LSS Regionals were discontinued in the 2009-2010 fiscal year.

Originally, the continuing education seminars were offered as one program in each different location throughout the state at different times during the year. Then, two workshops were offered simultaneously in each location at different times during the year. Thereafter, the seminars were offered in eight locations throughout the state on the same date. Starting in 1988, the continuing education seminars would only be offered at the request of a local

association. One such request from Orange County LSA promulgated the development of a syllabus entitled "The Beginning Legal Secretary." The syllabus is revised and updated by the Council and offered for sale to assist local associations with educational programs. In 1996, the name of the syllabus was changed to the "Legal Secretary's Reference Guide."

In 1997, the Council distributed a new publication entitled, "Guidelines for Preparation of a Legal Educational Program," which contains the guidelines used for MCLE credit, along with other information needed for presenting a successful seminar.

INTERCLUB RELATIONS

Prior to 1940, an Interclub Relations Committee was established as a means of promoting closer relationships among associations. Local associations were encouraged to work with other groups in their community and to plan functions with neighboring associations at which the members could become better acquainted and ideas could be exchanged.

Because of the distances involved, it was difficult to schedule truly statewide events. In 1964, however, an interclub luncheon was held at the Highlands Inn, Carmel, in honor of past state presidents and members of Legal Secretaries, Incorporated, who then held office in the National Association of Legal Secretaries. There was a large attendance of members from throughout the state.

As a direct outgrowth of the Interclub Committee, an organization known as "Los Angeles Coordinating Council" was formed. This was later designated the "Los Angeles County Forum of Legal Secretaries," a name suggested by then-President Evelyn Atwood. Other such organizations include the Bay Area Legal Secretaries Forum, the Southern Counties Forum, and the Northern Central Valley Forum. On March 11, 1989, the Southern Counties Forum was disbanded, and in 1990 the North State Legal Symposium in Redding was added.

For several years, a variety of statewide events were scheduled and in an attempt to avoid conflict a calendar of such events was prepared and published.

In 1979, this chairmanship was abolished but reinstated in 1983 under the duties of the Executive Advisor. Now known as *Inter-association Chairman*, the Executive Advisor prepares a "master calendar" listing all local association Inter-association activities, as well as items sponsored by local association groups and outside groups.

Beginning in 2012, the "master calendar" is now posted on the LSI website.

LEGAL SECRETARY OF THE YEAR

A plan for a contest to select the California Legal Secretary of the Year was proposed and adopted in 1969. Each local chapter was encouraged to submit the name of a contestant, and each year a panel of judges was selected to determine the winner. Their decision was based on scores attained in the following areas:

| | |
|---|-----|
| Qualities pertaining to being a legal secretary | 60% |
| Service to local, state and national associations | 30% |
| Civic, charitable or religious activities | 10% |

The contest was continued for five years, but was terminated in May 1974. The winners were:

| | |
|----------------------------------|------|
| UNA CLARK, San Diego LSA | 1970 |
| VAL PERRY, Los Angeles LSA | 1971 |
| RHODA SPENCER, San Diego LSA | 1972 |
| DORIS ARBUCKLE, Butte County LSA | 1973 |
| GLORIA NOREN, Alameda County LSA | 1974 |

Stuart F. Cooper Company generously provided and presented the award each year.

LEGAL PUBLICATIONS

LSI LEGAL PROFESSIONAL'S HANDBOOK

Quoting from "Handbook, Legal Secretaries, Incorporated, California", published in 1956 (a handbook of procedure for local and state officers):

"It was during 1931 that Zillah Stanton, a member of the first legal secretaries association which had just been organized in Long Beach, conceived and developed the idea of a secretary's outline of legal procedure in loose-leaf form. These sheets were called 'Aids to Legal Secretaries'."

Later, the San Diego Association, with the assistance of Louise Cord, first Federation President, enlarged upon the idea and produced a similar loose-leaf booklet bearing the same title; the Los Angeles Association likewise commenced the preparation of similar material.

During her administration, Ruth M. Bauchet, second Federation President (1936-1938), Zillah Stanton and the San Diego Association, turned over to Inez Ingram, Chairman of the Legal Procedure Committee, all available material with the hope that a book of substantial value to legal secretaries throughout the state would result. Subjects were assigned to members of that committee in fields in which they were particularly well qualified

and who had access to outstanding authorities. Such assignments were completed with the aid of other members of their associations, members of the Bench and Bar, and court attaches. This material was then revised and supplemented by Miss Ingram for the secretaries, and by The Honorable B. Rey Schauer, Justice of the California Supreme Court, for the profession, with the generous assistance of other prominent legal authorities.

A contest was held to select a title for the book. From the fifty-two proposed titles, the Executive Board of the Federation chose "*Legal Secretary's Handbook (California)*", which Leta Lyle Niccum, who became the third Federation President, had submitted. The *Legal Secretary's Handbook (California)* was first published and copyrighted in 1940. It was priced at \$4.89, which included tax and free delivery anywhere. There were three printings of the first edition and a revised edition was soon published. Special mention should be made of Parker and Baird, and its successor Parker & Son Publications, Inc., who demonstrated their confidence in the success of the handbook by publishing it at their expense, relying upon recovering the cost from sales.

By May 1942, there were approximately 1,500 Handbooks in use, relied upon not only by legal secretaries, but by members of the legal profession. During World War II, when the publisher suffered a shortage of personnel, Inez Ingram handled the details connected with the forthcoming amendments, including receiving orders, accounting for money collected, and distributing the amendments.

In September 1948, the University of Southern California began its administrative course for legal secretaries and the *Legal Secretary's Handbook (California)* was chosen as its text.

Before October 1959, when Inez Ingram retired, seven editions of the Handbook had been published. Patricia S. Brady, Beverly Hills Legal Secretaries Association, who had worked with Inez Ingram, was appointed editor in November 1959. In 1960, the eighth edition was published. Due to Mrs. Brady's dedication and efforts, subsequent revised editions followed, with the tenth edition published in 1971. It became apparent that it would be beneficial to have supplements prepared for that edition to reflect the ever-increasing changes enacted by the Legislature. Such supplements were published in 1972, 1974 and 1975.

Work on the eleventh edition was begun by Mrs. Brady, assisted by Marian R. Freeman, Stockton-San Joaquin County Legal Secretaries Association, who was appointed Editor in 1976. In 1977, that edition was published and supplemented in 1979, 1980 and 1981.

To bring the twelfth edition of the handbook to fruition, the handbook revisions committee was created during the presidency of Diana E. Estabrook, PLS, CCLS, in 1985. This was a drastic change from the single editor to a team concept. This concept proved so successful that the Publications Revision Committee was formalized in 1986. Members of

this committee are the Editor, *Legal Secretary's Handbook*; Editor, *Law Office Procedures Manual*; and three assistant editors.

The twelfth edition was published in 1985 and first supplemented in 1986.

From the very beginning, the *Legal Secretary's Handbook* (California) has been extremely well received by all levels of the legal community. There are copies in law offices throughout the state and they have been, and are, referred to by attorneys as well as by legal secretaries. The compilation and publication of this book has served to enhance the image of Legal Secretaries, Incorporated. In addition, it has produced revenue in excess of \$725,000 for Legal Secretaries, Incorporated, which has enabled the association to keep its dues at a minimum and to participate in many varied and worthwhile programs.

In 1989, the agreement to publish the *Legal Secretary's Handbook* with Parker & Son Publications, Inc. was terminated. After receiving several bids, the new publisher was The Rutter Group. Several promotions were utilized to bring the book back into the law offices. The agreement was drawn up by Steve Waldo, Esq. of Severson & Werson in San Francisco.

In 1997, the Board of Governors voted to change the name of the publication to *LSI Legal Professional's Handbook*. The title was selected through a contest won by Diane Madison-Jones of Northern San Diego County LSA.

LAW OFFICE PROCEDURES MANUAL

When Parker & Son Publications, Inc. ceased publishing the *Legal Secretary's Resource*, requests for bids were sent to printers. The governors selected The Rutter Group. The Rutter Group suggested changing the name of the publication from *Legal Secretary's Resource* to *Law Office Procedures Manual* in order to win a broader-based subscribers list. *The Law Office Procedures Manual* is a teaching tool to be used as a companion to the *LSI Legal Professional's Handbook*. The agreement was also drawn up by Steve Waldo, Esq. of Severson & Werson in San Francisco.

In 1985, the Instructor's Guide for use with the *Resource* was revised. Then in 1988, it was determined that the Instructor's Guide needed to be expanded, and in February 1989, work began on a comprehensive guide based on responses to surveys submitted to schools who had used the *Resource* in the past. In May 1991, the Civil Procedure and Teacher's Training sections of the Guide were distributed to the governors. The Court Structure chapter was distributed at the November 1991 conference. By 1997, Instructor's Guides for all chapters were completed for use. The Instructor's Guides are updated as needed by the Continuing Education Council.

In 1990, Legal Solutions, Inc. donated computer software for preparation of the Judicial Council forms, with LSI having to purchase the updates. In 1990, the new edition of the *Law Office Procedures Manual* was dedicated in memory of Ellen Molick, PLS, CCLS, of San Francisco LSA.

In February 2014, new Royalty Agreements were executed between LSI and The Rutter Group for the *Legal Professionals Handbook* and the *Law Office Procedures Manual*.

LEGAL SPECIALIZATION SECTIONS

In February 1987, five legal specialization sections were formed to offer specialization for legal secretaries similar to that offered by the State Bar of California. The first sections included Family Law, Law Office Administration, Litigation, Probate/Estate Planning and Real Estate. In February 1988, it became a standing committee. The Criminal Law Section was added in 1989, and the Corporate/Business Law section was added in 1990. In 1995, the Real Estate and Corporate Sections were combined and renamed as the Transactional Law Section. In 2016, Family Law and Criminal Law sections were combined, and the Federal Law section was added.

In 1989, the Sections offered the first regionals with five programs on two different dates in Northern California and three different dates in Southern California. In 1990, the Sections offered workshops in Family Law, Real Estate, Civil Litigation and Probate/Estate Planning in Costa Mesa; the one planned for Northern California was not held due to lack of a suitable location.

The following is a table of locations of the Spring and Fall Regionals, respectively, commencing with 1990:

| | |
|-------|------------------------------------|
| 1990 | Costa Mesa |
| 1991 | Los Angeles/Oakland |
| 1992 | Fresno/Santa Clara |
| 1993 | Eureka |
| 1994 | Solvang/Monterey |
| 1995 | Oxnard/Tahoe |
| 1996 | Anaheim/Tahoe |
| 1997 | Ontario/Redding |
| 1998 | Solvang/Eureka |
| 1999 | Palm Springs/Chico |
| 2000. | Palm Springs/Fresno |
| 2001. | Palm Springs/Redding |
| 2002. | Palm Springs/Redding |
| 2003. | Palm Springs/Chico |
| 2004. | Irvine/Redding |
| 2005. | Palm Springs/Rocklin |
| 2006. | Palm Springs/Rocklin |
| 2007 | Ontario/Rocklin |
| 2008 | Palm Springs/Roseville (cancelled) |
| 2009 | Orange County |

*LSS Regionals were discontinued during the 2009-2010 fiscal year.

MARKETING

In February 1990, it was recommended that LSI have an ad hoc Marketing Committee. In May 1990, a special committee entitled "Marketing Committee" was established, consisting of a chairman, three regional directors, and an outside consultant to market LSI and all its programs statewide. The first Marketing Committee consisted of the Executive Advisor as coordinator, the Director of Public Relations, the Professional Liaison, the Advertising Manager, and Jack Lamp. The Marketing Committee consulted Carole Jordan of Altman & Weil, a marketing consultant.

The Marketing Committee is responsible for the LSI booth at the State Bar Annual Meeting under direction of the Professional Liaison. By August 1990, the Marketing Committee prepared a new membership brochure and a "canned" speech for presentation by local associations. The Marketing Committee presented a workshop at the November 1990 Conference with Carole Jordan as the speaker. At the 1991 Annual Conference, the Marketing Committee presented "Operation Motivate/Activate" to encourage a statewide membership drive. In August 1991, the Marketing Committee sponsored a free CCLS workshop. In conjunction with *The Daily Journal*, free advertising was available for local association activities. At each conference, the Marketing Committee is responsible for an information table to promote membership.

In 1991, The Rutter Group presented LSI with its own display booth for use at the State Bar Annual Meeting. The display booth was completely revised and paid for by The Rutter Group in 2008. Since LSI previously received the booth at no cost, the State Bar began to pay for sleeping rooms for the Professional Liaison and the LSI President, as well as other amenities for the LSI volunteers during the State Bar Annual Meeting. LSI ceased coordinating volunteers for the State Bar Annual Meeting in 2000.

In 1992, the structure of the Marketing Committee was changed as follows: The President shall appoint a special Marketing Committee, consisting of a chairman and not more than four members, each of whom shall be approved by the elected officers.

In November 1999, the LSI Second Vice President was designated as chairman of the Marketing Committee. The chairman of the Marketing Committee was then designated as the person responsible for coordinating all aspects of the marketing booth at the State Bar Annual Meeting. Later, when the position of LSI Second Vice President was eliminated, the LSI Vice President took over as chairman of the Marketing Committee.

MISCELLANEOUS

MOTTO AND SLOGAN

In 1938, the motto "We Serve" and the slogan "An Ounce of Loyalty Is Worth More Than a Pound of Cleverness" were adopted by the California Federation of Legal Secretaries to signify the intentions of the organization. In 1993, the motto was changed to "Excellence Through Education."

OFFICIAL COLORS

In 1940, Legal Secretaries, Incorporated adopted blue and gold as its official colors. These colors have been, and continue to be, used on the publications as well as at functions where they can be included in the decorations.

MEMBERSHIP PIN

There was interest in having a membership pin designed. At the Board of Governors meeting at Santa Barbara in September 1941, such a pin was adopted. However, interest was expressed in a new pin and another design was adopted in 1982. Magnetic-back membership pins were purchased in 2006 as an alternative to the straight-pin variety. In 2015, the Marketing Committee redesigned the membership pin to incorporate LSI's new logo and tag line.

PRESIDENT'S PIN

A president's pin is also available for the local associations to purchase. In 1989, a new design with embossed branches around the edge was made available through Corporate Office. A pendant with the same design is also available through Corporate Office. In 2009, magnetic-back president's pins were purchased as an alternative to the straight-pin variety. In 2015, the Marketing Committee redesigned the president's pin to incorporate LSI's new logo and tag line.

GOVERNOR'S PIN

The Marketing Committee thought that the governors should have their own pin. In May 2016, a governor's pin was made available for local associations to purchase.

CCLS PIN

In 1990, a CCLS pin was selected from designs prepared by Linda Duarte and Judy Wagner-Estrin, both of Long Beach LSA. A supply was purchased from Jerry Webster in Santa Monica, and the pins are available from Corporate Office.

BANNER

In 1967, a banner was designed for display by the association. It consisted of a blue background emblazoned in gold letters, with the words:

LEGAL SECRETARIES, INCORPORATED
WE SERVE
Member of
NATIONAL ASSOCIATION OF LEGAL SECRETARIES

This banner was exhibited at each meeting of the Board of Governors and at Annual Conferences as well as in the association's booth at the State Bar Annual Meetings. The banner disappeared at the State Bar Annual Meeting in San Diego in 1971. Funds to replace it were generously contributed by William E. Brown, of Legal Directories Publishing Company.

Because Legal Secretaries, Incorporated is not now affiliated with the National Association of Legal Secretaries, the banner was replaced by a wooden plaque in 1982 for use at all LSI meetings. However, the banner, with the words "NALS" removed, was used at most non-LSI functions, e.g., State Bar of California Convention, etc. until its disappearance. The wooden plaque was stolen from the car of the Professional Liaison and was never replaced.

LSI purchased an electric banner for use by the Marketing Committee at the marketing tables conducted at LSI conferences, forum events, and other opportunities for marketing presented to LSI.

GAVEL

On May 18, 1968, San Luis Obispo Legal Secretaries Association presented to President Lucille M. Thornton a gavel carved from the wood of a tree planted by the Mission Fathers at Mission San Luis Obispo de Tolosa in 1772. This historically significant item has been, and will be, used by each succeeding LSI president.

The original Legal Secretaries, Incorporated, gavel was mounted on a plaque and presented to Eula Mae Jett, founder.

LOGO

Originally, the corporate seal consisting of two concentric circles bearing the words "Legal Secretaries, Incorporated" and "Incorporated July 8, 1940" was used as the distinguishing mark of the association.

Later a logo (from the word "logotype," meaning two or more words cast in one piece of type) which contained the outline of the state of California with the words "California" and "Organized 1934" superimposed upon it was adopted. In 1970, that was replaced by a design

showing the outline of the state with the word "California" on it, the scales of justice in the lower left-hand corner and a quill pen in the upper right-hand corner.

In 1985, a License Agreement for the use of the LSI logo was prepared. Any time a local association or group wants to put the LSI logo on a product or document, LSI will enter into an agreement. If the product is to be sold, a \$10 charge will be made by LSI. This amount was increased to \$25 in 1995. In 1985, *The Legal Secretary* trademark was registered. The LSI mark is registered until December 25, 2024, and the registration of "*The Legal Secretary*" mark is renewed until June 11, 2025.

A new LSI logo was approved by the governors in February 2013. The United States Patent and Trademark Office approved usage of the new LSI logo in September 2014. Use of the new logo commenced at the beginning of the 2014-2015 fiscal year.

EULA MAE JETT PERPETUAL PRESIDENTS' CUP

In memory of Eula Mae Jett, a silver cup inscribed with the name of each president was donated by Stuart F. Cooper Company. It is known as the "Eula Mae Jett Perpetual Presidents' Cup" and is intended to be held by each president during the president's term of office. The initial presentation was made in 1975 to President Dee Downs (Buzzard). In 2003, when the cup had almost reached its capacity to accommodate names of presidents, Stuart F. Cooper Company had a base added to the cup to accommodate more names.

HOSPITALITY SUITE

In November 2000, the first LSI-sponsored Hospitality Suite was hosted by then-President Yvonne Waldron-Robinson, CCLS. The purpose of the Hospitality Suite was to give the members a place to gather between meetings and educational workshops at Annual Conferences and Quarterly Conferences to network with officers, chairmen, past presidents and members of other associations. LSI Past Presidents served as hostesses from 2000 to 2002. After that time, the hosting association arranged the hospitality suite with the assistance of LSI Past Presidents. In August 2006, Don Lee, a member of Merced County LPA became the official host of the hospitality suite.

STUDY OF STRUCTURE COMMITTEE

In 1975, a committee, known as Study of Structure, was appointed to study the structure and operation of Legal Secretaries, Incorporated and to make recommendations for the simplification, improvement or elimination of certain existing procedures and the establishment of new procedures. Various proposals were brought before the Board of Governors and acted upon. This committee functioned under the chairmanships of Lois Kittle, PLS, Santa Clara County Legal Secretaries Association, and Phyllis R. Hirsh, Beverly Hills Legal Secretaries Association, until it was terminated in 1979.

AD HOC COMMITTEE TO EVALUATE CHANGE OF CORPORATE NAME

In 2006, an ad hoc committee was appointed to evaluate the items affected and potential expense involved in changing the name of the corporation. The members of the committee were: LSI Executive Advisor, Mary S. Rocca, CCLS, Continuing Education Council Coordinator, Cheryl Ewing, and Advertising Chairman, Cindy Gajkowski, CCLS. After a thorough investigation, the ad hoc committee's recommendation was issued. It read as follows:

There seems to be a general consensus of the membership that a change is necessary; however, that change does not necessarily extend to changing our name. In the interest of compromise, the ad hoc committee recommends that Legal Secretaries, Incorporated utilize the acronym "LSI" with a tag line that adequately describes and markets our association and all the benefits it provides to the legal community. We further recommend that LSI explore more innovative methods of marketing our association, updating our website, and assisting our local associations in their marketing efforts.

The ad hoc committee recommendation was accepted and approved, and the tagline: "LSI - Educating California's Legal Professionals" was used as a marketing tool at the beginning of the 2007-2008 fiscal year.

At the November 2011 Quarterly Conference, a motion was made to change the name of the corporation. LSI President Brooke Atherton, CCLS, appointed an ad hoc committee consisting of Christa Davis, Chair, of Livermore-Amador Valley LPA, Laurelyn Bergfeld, CCLS, of San Fernando Valley LSA, Heather Czuleger-Nowak of Orange County LSA, Kristi Edwards, CCLS, of Marin County LPA, and Rachel Malerbi of Placer County LPA. The motion to change the name of the corporation was tabled to the May 2012 Annual Conference, to allow the ad hoc committee to investigate the matter and prepare a recommendation.

At the February 2012 Quarterly Conference, the ad hoc committee made the following recommendation which was passed:

1. Change or modify LSI's name.
2. Hire Jeremy Durant, MBA, of Business Principal/Bop Design to perform the following duties, including, but not limited to:
 - a. Assist with the name change or modification;
 - b. Revamp LSI's logo and brand development;
 - c. Redesign and develop LSI's website;
 - d. Redesign all marketing materials;
 - e. Design a four-page membership recruitment brochure, an email newsletter, and direct mail recruitment;

- f. Develop marketing strategies for the local associations in accordance with the changes and modernization of LSI; and
 - g. Assist with ongoing marketing strategies.
3. Hire attorney Dale Stern of Stern, Van Vleck & McCarron, LLP, located in Sacramento, to assist with the legalities involved in the name change or modification.

Once the marketing expert and attorney have been retained, the ad hoc committee recommends that the LSI Executive Committee, in conjunction with the LSI Marketing Committee, select a committee of four LSI members to work directly with Mr. Durant and Mr. Stern to assist in all areas of this project.

The recommendation was adopted and LSI entered into a contract with Business/Principal BOP Design.

WAYS AND MEANS

In order to finance various projects, over the years members of Legal Secretaries, Incorporated, have engaged in a variety of fund-raising activities, one of the most successful of which was the preparation and sale of a cookbook entitled "*AND THEY CAN COOK, TOO.*" Drawings for a \$100 bill were held at conventions for many years. Other items sold include attorney interview sheets, Stenocrema, letter openers, carbon paper, stationery, tote bags, garment bags and LSI stationery.

The Ways and Means chairmanship was terminated after the association was able to maintain a balance sufficient to meet the expense of the projects it undertook.

All ways and means projects are coordinated through the Executive Advisor. In the past few years, various projects were encouraged such as day books from Charles Bragg, the book drive with The Rutter Group, tote bags, wall clocks and note cards from Jack Lamp Graphics. Most projects were arranged merely to encourage local associations to do fundraising, not to generate money for LSI.

WEBSITE

In 1996, the Board of Governors approved the implementation of the LSI website: www.lsi.org.

Dennis Caughran, J.D., of Taren Systems designed the website and served as LSI's webmaster since its inception with his contract being renewed annually. Taren Systems merged with Boston Reed in 2000, and Boston Reed served as LSI's webmaster through 2001. In January 2002, Steve Amerige of Extends Internet became the LSI webmaster, and in 2003 Robert Delp became LSI webmaster. In 2008, Scott Herman of WebEditor Design Services, Incorporated, took over as the LSI webmaster, redesigning and updating the site to a more professional, user-friendly resource for our members, and a great marketing tool for LSI.

In 2007, advertising space on the website was sold to professional legal services in order to generate revenue for LSI. Janney & Janney was the first company to place an ad on the LSI website. In 2014, the LSI website was revamped.

WEBSITE EDITOR

In August 2012, a new chair position titled “Website Editor” was added. The Chair is responsible for keeping all the information on the LSI website current. In 2013, the title of the chair was changed to “Social Media.”

OFFICIAL CLOSING SONG

In May 1947, Elsie Riner, General Chairman of the convention held in Bakersfield, introduced a song, which she had composed to the tune of "Til We Meet Again." It was so well received that at the meeting of the Board of Governors in September of that year, it was adopted as the official song for closing each convention/annual conference.

'TIL WE MEET AGAIN

Now the time has come when we must part,
Happiness we hope will fill each heart,
As we bid you fond farewell
May some pleasant memories dwell,
With each one as you go on your way,
Sunshine follow you through every day
And your hearts be light and gay
'Til we meet again.

Adios, Aloha and Goodbye,
Let a smile erase each little sigh,
May success lie just ahead
On each path your footsteps tread,
Good luck in each task that you pursue
And may every dream you dream come true
That's the wish we wish for you
'Til we meet again.

OPEN FORUM

In 1999, Legal Secretaries, Incorporated, held its first Open Forum on Membership at the August Quarterly Conference in Lancaster, California. LSI Past President Deanna A. Pepe, CCLS, PLS, was the moderator. Members were encouraged to discuss their concerns regarding membership issues, local association issues, and the future of LSI and the local associations. The program was well received and very productive.

Again, at the August 2004 Quarterly Conference in Ventura, California, LSI President, Mary S. Rocca, CCLS, reinstated the Open Forum program with LSI Past President, Deanna A. Pepe, CCLS, PLS as the moderator. After that time, during the 2004 - 2006 term, several mini-open forums moderated by the president and members of the Executive Committee were held at the conclusion of the business portion of the Board of Governors meetings.

PRESIDENT'S AWARD

In 1979, Suzanne Allen, as president of LSI, instituted a tradition of giving a President's Award to an LSI member who, during the course of the previous year, had made a significant contribution, in the president's opinion alone, to the president, to LSI, or both. The criteria was to give the award to someone other than an LSI elected officer, since the elected officers' obligations to LSI are mandated by virtue of their office.

The first honoree was Marian Freeman, Editor of the *Legal Secretary's Handbook*, from Stockton-San Joaquin County LSA, followed by:

- 1980 Faye Lee (Bresler), PLS, Historian, San Francisco LSA
- 1981* Ellen K. Molick, PLS, CEC Coordinator, San Francisco LSA
- 1982* Gay Mullins, PLS, Editor, The Legal Secretary, Southern Alameda County LSA
- 1983 Clara Sirex, PLS, Parliamentarian, San Mateo County LSA
- 1984 Millie Valdez, Member, San Diego LSA
- 1985 Members of the Continuing Education Council:
Kay J. Bliss, PLS, CCLS; Marve Breech, CCLS; Linda Duarte; Gloria Jones, PLS; Loretta Rieb, PLS, CCLS; Kay Thornburg; Dorothy Witt, PLS; and
Member-of-the-Year, Trudy Rasmussen, PLS, CAA
- 1986* Rhoda C. Spencer, PLS, CCLS, San Diego LSA
- 1987 Susan Morse, Member, Santa Clara County LSA
- 1988 Patricia E. Miller, PLS, PLS Chairman, Santa Cruz County LSA
- 1989 Christine Durbin, Parliamentarian, San Mateo County LSA
- 1990 Janet de Laive, CCLS, Editor-in-Chief, Santa Cruz County LSA
- 1991* Patricia Parson, Executive Advisor, LSI Past President 1988-1990, Alameda County LSA
- 1992 Jack Lamp, Jack Lamp Graphics, Honorary Member
- 1993* Rosa I. Frank, CCLS, Beverly Hills/Century City LSA
- 1994 Suzanne M. Allen, PLS, CCLS, LSI Past President 1978-1980, Santa Barbara County LSA
- 1995 Kay J. Thornburg, Continuing Education Council Coordinator
- 1996 Marve Breech, CCLS, Legal Specialization Sections Coordinator, Sacramento LSA
- 1997 Marge Burglund, PLS, CCLS, Editor-in-Chief, San Diego LSA
- 1998 Sue Ellen Wagstaff, PLS, LSI Parliamentarian, San Diego LSA
- 1999 Members of the Legal Specialization Sections:
Kay J. Bliss, PLS, CCLS, Coordinator; Sandra Jimenez, CCLS; Lori Young, CCLS; Carol Cuzner; Michele Ross; Dee Woline-Johnson; Lynn Memolo/Maria Hoff*

- 2000 Deanna A. Pepe, CCLS, PLS, LSI Executive Advisor, LSI Past President 1996-1998, Beverly Hill/Century City LSA
- 2001 Loretta K. Rieb, PLS, CCLS, Editor-in-Chief, Stanislaus County LSA
- 2002 Joyce I. Seymour, PLS, CCLS, LSI Past President 1986-1988, San Francisco LPA
- 2003 Deborah Rickert, CCLS, Editor, *The Legal Secretary*, Orange County LSA
- 2004 Beverly Miller, CCLS, LSI Parliamentarian, Mt. Diablo LSA *and* Yvonne Waldron-Robinson, CCLS, LSI Past President 2000-2002, San Francisco LPA
- 2005 Kay Bliss, CCLS, Continuing Education Council Coordinator, Riverside LPA
- 2006 Heather Edwards, Legal Specialization Sections Coordinator, San Fernando Valley LSA
- 2007 Mary S. Rocca, CCLS, Executive Advisor, LSI Past President 2004-2006, Alameda County LSA
- 2008 Jennifer Page, CCLS, Legal Specialization Sections Coordinator, Marin County LPA
- 2009 Astrid Watterson, CCLS, CCLS Chair, Sacramento LSA
- 2010 Lugene Borba, CCLS, Editor-in Chief, Stanislaus County LPA
- 2011 Deborah Rickert, CCLS, Editor, *The Legal Secretary*, Orange County LSA
- 2012 Christa Davis, Executive Advisor, LSI Past President 2008-2010, Livermore-Amador Valley LPA *and* Rod Cardinale Jr., Legal Procedures Chairman, Santa Clara County LPA
- 2013 Astrid B. Watterson, CCLS, LSI Parliamentarian, Sacramento LSA
- 2014 Terrie Quinton CCLS, CCLS Chair, San Diego LSA *and* Shaylene Cortez, CCLS, Legal Secretarial Training, Riverside LPA
- 2015 Maria Bishop, CCLS, Editor-In-Chief, Mt. Diablo LPA
- 2016 Dawn R. Forgeur, CCLS, Legal Specialization Sections Coordinator, Sacramento LSA

*Deceased

PRESIDENTS' ROUNDTABLE

To provide an opportunity for local association presidents to become acquainted with each other and with the aims and purposes of Legal Secretaries, Incorporated, the Presidents' Roundtable was established. It was approved by the Board of Governors in 1968 during Bette Barton's term. In 1970, the first such roundtable was held at the convention in Bakersfield and since that time a half-day at each Annual Conference has been set aside for it.

It is intended as a forum for both outgoing and incoming local presidents so that they can exchange ideas with respect to goals and accomplishments as well as possible solutions to problems. A Past President of Legal Secretaries, Incorporated usually acts as moderator. In addition, the moderator can counsel the presidents about assistance which is available from chairmen on the state level.

GOVERNORS' WORKSHOP

To provide an opportunity for local association governors to become better acquainted with their duties, it was decided that the Governors' Luncheon held at Annual Conference did not provide adequate time, so in 2009 a Governors' Workshop, moderated by Executive Advisor, Christa Davis, was offered for the first time as part of the Officer Chairman Workshop seminars.

OFFICER/CHAIRMEN TRAINING

The first Officer/Chairmen Training Luncheon was held in August 2012. The purpose is to train officers and chairmen on their duties and to provide an overview of goals and expectations for the coming year.

PROCEDURAL MANUAL

To enable the association officers and chairmen to function in an efficient and consistent way, a *Handbook of Suggestions to Committee Chairmen*, prepared by Evelyn Atwood, was adopted in 1946.

In 1960, a *Handbook for Officers and Committee Chairmen*, written by Evelyn Atwood and published by Stuart F. Cooper Company, was made available to the local associations for their guidance. It contained information as to the duties of each officer and chairman and was widely used.

In 1961 this "Gray Book," as it was known, was changed to the *Manual of Policy and Procedure of Legal Secretaries, Incorporated*. This manual was in a different format and was more comprehensive, containing a copy of the Articles of Incorporation and Bylaws of Legal Secretaries, Incorporated, along with the duties of the state and local officers and chairmen. This manual was revised over the years to reflect changes which occurred in the organization's bylaws and structure, and was last updated in August 1989. The materials covered in the manual are now set forth separately in the LSI History, Articles of Incorporation, Bylaws and Standing Rules.

Brass Tacks, A Protocol Booklet, was prepared in 1969 by Orange County Harbor Area Legal Secretaries Association. It was intended especially for use by new associations, as it covered everything from officer and committee set-up to how to bid for a Board meeting and convention. A first revision was completed in 1979. The title was changed to *Local Chapter Procedural Guide*, but changed back to *Brass Tacks* in 1982. This publication replaced the *Procedural Manual*.

It is the Vice President's duty to keep *Brass Tacks* updated regularly.

PROFESSIONAL LEGAL SECRETARY PROGRAM

Legal Secretaries, Incorporated came into existence because of a desire to upgrade the knowledge and skills of the legal secretary, so the idea of attainment of professional status for

its members was considered from the outset. The possibility of establishing a program for certification was discussed at Board of Governors meetings, and in 1955 a committee was appointed to prepare a plan of certification. Contact was made with the State Bar of California and the Institute for Certifying Secretaries in an effort to determine how such a plan could be implemented.

It was apparent that such a program should be developed on the national level, so in 1956 this committee was discharged and the matter of certification was referred to the National Association of Legal Secretaries for action. By 1958, a plan had been adopted which involved a comprehensive, two-day examination to be administered at designated testing centers.

Legal Secretaries, Incorporated, appointed a committee to work with the National PLS Chairman in an effort to encourage California members to participate. This committee prepared a "cram test" which was made available to local association study groups to assist members to prepare for the examination.

In 1960, a testing center was established in San Francisco and 12 LSI members from throughout the state gathered to take the first PLS examination ever given. Virginia G. Haines and Catharine Ryan, both of San Francisco, and Bernice M. Tabbert, of Stanislaus County, successfully completed all parts and thus attained certification.

Legal Secretaries, Incorporated, continued to promote this program by holding seminars throughout the state, workshops at convention, and the development of a Mock PLS Examination. The program flourished, and as of May 1982 there were 252 secretaries in California entitled to use the coveted PLS designation.

Since 1988, the certification program sponsored by LSI for California legal secretaries is the California Certified Legal Secretary (CCLS).

PROFESSIONAL LIAISON

From the earliest days of this association, attempts were made to establish a cordial relationship with members of the Bar so that they would become acquainted with the aims and objectives of this organization. A considerable amount of support and recognition has been received. For instance, in 1951 the California District Attorneys Association adopted a resolution endorsing the objectives of Legal Secretaries, Incorporated, and encouraging formation of local associations. In 1952, Jean Hecker represented Legal Secretaries, Incorporated, as a participant in a panel discussion at the State Bar of California convention in Los Angeles and at the American Bar Association convention in San Francisco.

In 1962, a State Bar Liaison Committee was established, the name of which was changed to Professional Liaison in 1976.

Since 1963, members of Legal Secretaries, Incorporated have staffed booths at the State Bar Annual Meeting. By exhibiting copies of the *Legal Secretary's Handbook*, the *Legal Secretary's Resource*, *The Legal Secretary* and membership brochures, many attorneys have

become acquainted with the association's professional and educational aims. Newer publications have replaced the old, and material on the California Certified Legal Secretary program has also been added for display.

Members of Legal Secretaries, Incorporated have participated in seminars at various locations, including one sponsored by the Century City Bar Association, the Economics of Law Practice of the State Bar of California, Legal Secretaries, Incorporated, and the Association of Legal Administrators at Century City in 1980. This was repeated at the State Bar Annual Meeting that year, and in 1981 Legal Secretaries, Incorporated conducted a workshop at the State Bar Annual Meeting.

LSI has worked with the California Young Lawyers in sponsoring continuing education seminars, and in 1985 was asked to be an exhibitor at the first CEB Educational Fair in Los Angeles.

In 1974, the Advisory Council on Legal Forms was created by the Judicial Council of the State of California to design and recommend forms used in the state courts. Legal Secretaries, Incorporated was asked to appoint a representative to serve on the Committee on Legal Forms. The responsibility of attending Judicial Council meetings was transferred from the Professional Liaison to the Legal Procedure Chairman in 1992.

In 1984, the Law Office Products & Management Chairman coordinated seminars to be presented with the Law Office Management Section of the State Bar of California on April 13 in Orange County; April 27 in San Jose; May 4 in Berkeley, and May 11 in San Diego. Other joint seminars were proposed for two locations simultaneously using the syllabus prepared by the CEC in August 1983. Another joint seminar was planned for March 1987. In 1989, a joint seminar was held with the Law Practice Management Section during the 1989 Annual Meeting. LSI eliminated the chairmanship of Law Office Products & Management in 1992, but a special advisor to the Law Practice Management Section of the State Bar of California was appointed by the LSI President.

Many members have become attorneys and, one, Mary S. Parker, PLS, Los Angeles Legal Secretaries Association, became a Judge of the Workers Compensation Board. Others include Barbara Brandis, Lois Kittle, Lois Norton, Mary M. Connolly, all PLSes from Santa Clara County LSA; Dorothy Wolfe, San Mateo County LSA; Mary L. Wright, PLS, and Kim Gibbins, Long Beach LSA; Patricia S. Brady, PLS, Beverly Hills/Century City LSA; Neoma Knitter, Indio Desert Oasis LSA; Diana L. Penny, Sacramento LSA; Connie Sheehan, Southern Alameda County LSA; Lori Hunt, Napa County LSA; and Faye Lee Bresler, San Francisco LSA.

Members have served in various capacities. Patricia A. Greene, Past President of Legal Secretaries, Incorporated, served as a public member of the Board of Governors of the State Bar of California; V. Sue Hanson, Santa Barbara Legal Secretaries Association, served a three-year term as a committee member on the Judicial Council; Rosa Frank, PLS, CCLS, Beverly Hills/Century City LSA, and Caroline E. Van de Pol, PLS, CLA, CCLS, Santa Clara County LSA, served three-year terms on the Consortium for Lawyering Performance and Education of the State Bar.

From 1975 to 1999, Legal Secretaries, Incorporated, under the direction of the Professional Liaison Chair, has provided volunteers to assist the State Bar during their Annual Meeting. In exchange for our assistance, LSI was offered two or three free rooms at the hotel for its members' use. Availability was on a "first-come, first-served" basis. In 1996, that number increased to four rooms, with the LSI President deciding who will use the rooms. In 2000, Legal Secretaries, Incorporated determined that it was no longer cost effective or beneficial to LSI to continue to provide volunteers to the State Bar for their Annual Meeting.

Effective in fiscal year 2000-2001, the Professional Liaison Chairmanship was combined with the Day-in-Court Chairmanship, and the Professional Liaison was no longer a member of the Continuing Education Council.

PUBLICATIONS REVISION COMMITTEE

In November 1985, the Publications Revision Committee ("PRC") was formed. It was restructured in 1990. The Governors adopted the following provisions:

"This committee shall consist of the Editor of the *Legal Secretary's Handbook* [LSH], the Editor of the *Legal Secretary's Resource* [LSR] and three members. At the expiration of each term, at least three existing PRC members shall be retained for the ensuing year. The President shall appoint the Editor of the *Legal Secretary's Handbook* or the Editor of the *Legal Secretary's Resource* from among the retained members. In the event of the resignation of either Editor, the President shall appoint a successor Editor from within the PRC and appoint a new member to complete the committee. The PRC shall be co-chaired by the Editor of the *Legal Secretary's Handbook* and the Editor of the *Legal Secretary's Resource*. These co-chairmen shall be members of the CEC. The PRC shall be responsible for revising the LSH and the LSR annually, semi-annually or more frequently as required by changes in legislation and/or Judicial Council forms. The Editor of the LSH shall be responsible for coordinating the revision of the LSH. The Editor of the LSR shall be responsible for coordinating the revisions of the LSR. The co-chairmen shall be familiar with the publication of the material generated by the PRC members and the publisher's requirements to produce the revisions on a timely basis. The co-chairmen shall: (I) supervise the activities of the committee to eliminate duplication of effort, (ii) obtain from the Judicial Council its newly revised, adopted, or approved forms for use by the committee and (iii) serve as the publisher's contacts. The three members shall assist the Editors in their duties, as directed by the Editors. Each PRC member, other than the Editors, shall be called to one Quarterly Board of Governors Meeting and to Annual Conference of each year, or more frequently at the discretion of the Executive Committee."

In August 1987, the PRC developed guidelines for itself and in November 1988, it prepared the *Operating Manual*.

An Editor-in-Chief position was developed to head the PRC, and Susan Morse of Santa Clara County LSA was the first Editor-in-Chief. Since both Editors were on the CEC, they were removed and the Editor-in-Chief was added to the CEC.

In 1990, the structure of the PRC was changed to make the terms staggered. Commencing with the 1990-1991 PRC, two members were appointed for one year, two members were appointed for two years and two were appointed for three years. All future appointments would be for three-year terms. This way the President would appoint two new members to the PRC each year, which would guarantee continuity in observing the guidelines and learning the *Operating Manual*.

In 2012, another Assistant Editor position was added to the PRC, making it a committee of nine.

SCHOLARSHIP PROGRAM

Over the years, interest was expressed in giving scholarships, and in 1963 a scholarship program was adopted as the state project of Legal Secretaries, Incorporated. A committee was appointed to formulate the plan for such a program and the following year it was decided to sponsor a scholarship contest, with entrants nominated by local associations and judges appointed by Legal Secretaries, Incorporated. Rules were adopted and it was agreed that the winner from among second-year women college students who desired to enter the field of law would receive \$250, second place \$100 and third place \$75.

This program, which since 1974 has been known as the Eula Mae Jett Scholarship Fund, has continued with the rules as well as the amounts to be awarded changing from time to time. The rules were also changed to include male entrants. In recent years, the scholarships have been given to students enrolled in legal secretarial courses at college as well as to high school seniors who are interested in pursuing careers as legal secretaries.

In 1984, a third category was added to the Plan of Administration. Plan A was changed to offer five awards of \$500; Plan B was changed to offer five awards of \$300; and Plan C (the re-entry plan) was instituted offering four awards of \$300 each. In 1992, the Eula Mae Jett Plan of Administration increased the amount of the LSI scholarships offered in each category to \$1,000, but decreased Plan A to three awards, Plan B to three awards and Plan C to two awards, for a total of \$8,000. In addition, "court reporters," "legal assistants," and "legal administrators" were allowed to apply. In 1992, the Career Promotion and Scholarship chairmanships were combined.

In 2002, the program was revised to offer two awards under Plan B and three awards under Plan C.

In 2016, the Plan of Administration was revised to reflect that the first place winner in each category would receive \$2,000 (previously \$1,500) and the second place winner in each category would receive \$1,000 (previously \$1,500).

STATE PROJECTS

REVOLVING FUND

At the 1946 convention, the delegates voted to adopt a state project known as a "Revolving Fund." Proceeds derived from various sources, such as the sale of the framed Code of Ethics, were used to create and maintain this fund. It was intended as a source of loans to members who were faced with an emergency. An amount of up to \$200 could be borrowed, secured by an interest-free promissory note, with repayment to be made, in monthly installments. A committee was appointed to administer this fund, which continued in existence until 1961. The current Corporations Code, however, now indicates the corporation cannot benefit a member.

GIRLS' TOWN OF AMERICA

In 1953, a new state project was adopted which involved aid to a school for underprivileged girls and girls from broken homes. This school, located in Riverside County, was known as "Girls' Town of America," and its residents came from throughout California. In 1956, a dental clinic was established at the school and the association provided dental care for those unable to pay for it. Until this project was terminated in 1967, contributions from Legal Secretaries, Incorporated included TV sets, food, shoes, clothing and cash.

THE LEGAL SECRETARY

The Legal Secretarial and *The California Secretarian* were the names given to the official publication of the California Federation of Legal Secretaries in the early years of the organization. At the 1936 convention, it was decided that a contest would be held to select a name for this publication which would more clearly reflect the association's aims and purposes. The Honorable Walter Desmond, Judge of the Long Beach Superior Court, won the contest with the name *The Legal Secretary*, which he suggested to give "public recognition to the legal secretarial profession".

For a time, this magazine was published every month, but in 1945 it became a quarterly publication. During the war years, a shortage of paper existed and problems were encountered in getting it published. In 1945, the convention issue was made possible only because the Los Angeles Legal Secretaries Association omitted one issue of its bulletin and the Los Angeles Daily Journal donated the stock. For some time, the Los Angeles Daily Journal printed this paper without charge.

Over the years, the magazine changed in appearance and content. In 1963, the convention issue was printed on glossy paper for the first time, and since 1965 all editions have been on glossy paper. In 1964, the Board of Governors authorized advertising in *The Legal Secretary*. The editor is an appointed officer, and in 1967 an Advertising Manager was appointed. In 1968, the Board authorized mailing the magazine to the governors for distribution to the local members, which eliminated the need for the governors to carry the magazines home from Board meetings and convention. For some years, Parker & Son, Inc., did the printing and the magazine was mailed directly to each member by use of that company's postal permit.

In addition to providing the membership with timely and interesting articles, since 1975 the magazine has served as a medium for giving notice of proposed bylaw amendments.

In 1988, Jack Lamp left Parker & Son and formed his own business--Jack Lamp/Graphics. Jack Lamp/Graphics was awarded the printing job for the magazine. They were responsible for printing the magazine and sending it to the members each quarter. Jack Lamp continued to work closely with LSI on the promotion of its programs. In 1996, Jack Lamp retired from Jack Lamp/Graphics and the magazine continued to be printed by his company, led by his son, Tom Lamp.

In 1997, the Editor of the magazine obtained new bids for printing the magazine. It was determined at the 1997 Annual Conference that a new printer would save the corporation over 40% on publication costs.

In June 1997, Monarch Printing was selected to print the magazine. The first issue printed by Monarch was August 1997.

In March of 2010, LSI entered into a two-year contract with Modern Litho to print the magazine. The first issue printed by Modern Litho was a test issue for February 2011.

EPILOGUE

This account, which covers the history of Legal Secretaries, Incorporated, for its 80+ years of existence is based upon the records of the association, including minutes and old copies of *The Legal Secretary*, as well as recollections and memorabilia of Past Presidents and other members of long standing.

Many events and changes have occurred during the period covered: the Great Depression; World War II; a change in family lifestyle; from train travel to automobile to jet plane; the length of skirts up and down, finally giving way to the pant suit; glamorous hats which once dominated the scene virtually gone, along with gloves; and in the office, from manual typewriter to electric, to electronic to memory word processing, and now the computer and Internet; from manual to electric adding machine to electronic calculator, and Excel spreadsheets; dictating and transcribing equipment from the wax cylinder to the magnetic belt, to micro cassettes and voice-activated computers; from hectograph, mimeograph, ditto to sophisticated photocopy machines and scanners; and from operator telephone to dial, direct dialing across the country, to touch-tone to cell phones, to e-mail and the Internet.

Legal secretaries and Legal Secretaries, Incorporated, have withstood or embraced change and through it all, the aims and objectives of this corporation have remained constant.