AGENDA

November 2015 Conference Board of Governors Meeting
November 14-15, 2015
Riverside, California
Host Association: Riverside LPA

SATURDAY, NOVEMBER 14, 2015

CALL TO ORDER ........................................................................................................... 9:00 a.m.
Pledge of Allegiance .............................................................. Pamela S. Schuld, President
Orange County LSA

Code of Ethics .............................................................. Kathleen Gorham, President
Desert Palm LPA

Inspirational Message ................................................................. Annette Johnson, President
San Fernando Valley LSA

Welcome .......................................................................................... Mike Gardner
City Council Representative

Response ................................................................................................. Mary J. Beaudrow, CCLS
LSI President

INTRODUCTIONS:

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ROLL CALL .......................................................................................... Heather Edwards
LSI Executive Secretary

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.................................................................................................................................
.................................................................................................................................

Number Present: ___________ Quorum: ☐ Yes ☐ No
CORRESPONDENCE  ........................................................................... Heather Edwards  
LSI Executive Secretary  

INTRODUCTION OF TIMEKEEPER .............................................................................. Kim Oreno  
LSI Administrator  

INTRODUCTION OF PAGES ........................................................................... TBA  

APPROVAL OF MINUTES  
The Minutes of the August 2015 Quarterly Conference Board of Governors Meeting were timely mailed.  

Are there any other corrections?  ☐ Yes  ☐ No  

[  ]  Approved as mailed.  
[  ]  Approved as corrected.  

REPORTS OF ELECTED OFFICERS  
President  ................................................................................. Mary J. Beaudrow, CCLS  
Mt. Diablo LPA  

-----------------------------------------------------------------  
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Executive Secretary  ............................................................................. Heather Edwards  
San Fernando Valley LSA  

Resume of Executive Committee Meeting held on Friday, November 13, 2015  

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-----------------------------------------------------------------  

Vice President, Membership & Marketing Coordinator .......... Jennifer L. Page, CCLS  
Marin County LPA  

-----------------------------------------------------------------
Treasurer .................................................................Lynne Prescott, CCLS
Sacramento LSA

MOTION: The actions of the Treasurer in paying the routine bills of LSI during the second quarter of fiscal year 2015-2016 be ratified.

[  ] Motion carried.
[  ] Motion lost.

REPORTS OF APPOINTED OFFICERS

Executive Advisor .........................................................Sandra T. Jimenez, CCLS
Imperial County LPA

Parliamentarian .............................................................Astrid B. Romero, CCLS
Sacramento LSA

Editor-in-Chief .............................................................Maria Bishop, CCLS
Mt. Diablo LPA

Editor, *The Legal Secretary* ...........................................Deborah Schmidt, CCLS
Orange County LSA

Educational Program Coordinator .................................J. Cori Mandy, CCLS
San Diego LSA
Historian ........................................................................................   Denise Lopes, CCLS
Humboldt County LPA

Legal Specialization Sections Coordinator… .............................. Dawn R. Forgeur, CCLS
Sacramento LSA

COFFEE BREAK (time approximate) ............................................... 10:15 a.m.

EDUCATIONAL WORKSHOPS .......................................................... 10:30 a.m.

RECESS FOR LUNCH (time approximate) ...................................... 12:15 p.m.

CALL TO ORDER ............................................................................ 2:00 p.m.

ROLL CALL .................................................................................... Heather Edwards
LSI Executive Secretary

of ____________________________ LSA/LPA

of ____________________________ LSA/LPA

of ____________________________ LSA/LPA

Number Present: _______ Quorum: □ Yes    □ No

RECOMMENDATIONS OF EXECUTIVE COMMITTEE  .................. Heather Edwards
LSI Executive Secretary
REPORTS OF COMMITTEE CHAIRMEN

Advertising .................................................................................................. Larry McGrew
San Francisco LPA

California Certified Legal Secretary ............................................... Terrie Quinton, CCLS
San Diego LSA

**Career Promotion/Scholarship .................................................. Sylvia Marsh
Orange County LSA

Legal Procedure...................................................................................... Becky Neidhardt
San Diego LSA

**Legal Secretarial Training/Seminar ........................................ Shaylene Cortez, CCLS
Riverside LPA

Nominations and Elections ............................................................. Sandra T. Jimenez, CCLS
Imperial County LPA

**Professional Liaison/Day in Court .............................................. Anna M. Brownson, CCLS
Riverside LPA
Social Media .................................................. Rod Cardinale, Jr.  
Santa Clara County LPA  

California Certified Legal Secretary Certifying Board  
Chairman ............................................................... Elise Dresser, CCLS  
Santa Clara County LPA  

REPORTS OF SPECIAL COMMITTEES  
**Liaison to the Law Practice Management and Technology  
Section of the State Bar of California ............................. Mary S. Rocca, CCLS  
Alameda County LSA  

UNFINISHED BUSINESS  

NEW BUSINESS  

ANNOUNCEMENTS  
[Please line up at the floor microphone.] 

RECESS _____ p.m.  

November 2015 Quarterly Conference Governors’ Meeting Agenda  
** Denotes Chairmen Called to this Conference
SUNDAY, NOVEMBER 15, 2015

INTRODUCTION OF GUEST SPEAKER .............................................Shaylene Cortez, CCLS
Conference Chair

GUEST SPEAKER ........................................................................Teresa Rhyne, Esq.

CALL TO ORDER (time approximate) ........................................... 11:00 a.m.

ROLL CALL .................................................................................. Heather Edwards
LSI Executive Secretary
of LSA/LPA
of LSA/LPA
of LSA/LPA
Number Present: ___________ Quorum: □ Yes □ No

UNFINISHED BUSINESS


NEW BUSINESS


ANNOUNCEMENTS

[Please line up at the floor microphone.]

President Announcement – The winners of the five (5) scrip tickets to the Merced County LPA hosted February 2016 Quarterly Conference in Central California are:

1. _______________________________ LSA/LPA
2. _______________________________ LSA/LPA
3. _______________________________ LSA/LPA

November 2015 Quarterly Conference Governors’ Meeting Agenda
** Denotes Chairmen Called to this Conference
4. ______________________________ LSA/LPA
5. ______________________________ LSA/LPA

ADJOURNMENT

Time: ____________ a.m. / p.m.

February 2016 Board of Governors Meeting
February 26-28, 2016
Tenaya Lodge at Yosemite
Fish Camp, CA
Host Association: Merced County LPA
Thank you to those associations who responded to the Second Quarterly Directive. I appreciate you taking the time to share your concerns with me.

I asked the local association presidents in this quarter’s directive to provide a difficult situation they have experienced during their term as president that can be discussed at the President’s Luncheon at this conference. The local association presidents provided some interesting situations and questions that we will be focusing on during our luncheon. Many describe the always tricky question of how to attract more members, or getting members involved. These are age old concerns that even our founder, Eula Mae Jett faced way back when.

Courtesy of Long Beach LPA, Past President Christa Davis of San Francisco LPA was given a copy of an article penned by Eula Mae Jett in approximately 1966, reflecting on the questions “Why doesn’t membership increase?” “Why don’t we have better attendance at our meetings” And many more questions along this same line. To quote Eula Mae Jett:

Let’s ask ourselves these questions: What do we give our members? What incentive do we offer? Why did they join the association? This Association was founded for educational and social purposes. The sociability of the meetings is a wonderful thing and gives the members a lot of pleasure, but let’s not lose sight of the other purpose. Let’s ask ourselves another question: What do your members expect when they pay their dues, and, what did we tell them the purposes of the association were when we asked them to join?

What have we told our new members to expect when they join? Did we promise continuing education, networking opportunities, making new friends, etc.? While each of those aspects certainly happen, after a new member has joined, are we doing what we can to continue to expose them to those opportunities? We cannot expect to gain and maintain members with promises of furthering their education, providing networking opportunities, making new friends, etc., and then not show them the way. It starts with those first few meetings; make the newer members feel comfortable and welcome. Sit with them or invite them to sit with you and those around you and then include them in your conservations. Encourage them to get involved. The key to getting members involved is to make them feel they are a part of this organization. Help them to understand the history of LSI, the nuts and bolts of how it works, and why everyone’s involvement is crucial to our continued success. If we allow members to just show up to meetings and we do nothing to engage them, they won’t really understand or experience our purpose. New members are our future. They are the ones that will allow those who are ready, to
step back. Many times they are the rejuvenation as association needs. They bring new energy and fresh ideas, so cultivate them. It is so important. The care and feeding of new members is up to us.

As we ease into the third quarter of this fiscal year, there is much in the making for Legal Secretaries, Incorporated. The Continuing Education Council has been busy this past quarter with putting on all of the online classes: CCLS Study Group, and Beginning Legal Secretary class. Besides bringing revenue to LSI it is also providing a platform of reaching out to non-members who have never heard of our organization.

The Legal Specialization Section leaders continue to work to provide excellent topics and speakers for each quarterly and annual conference. Remember that membership to the LSS sections is from August 1, 2015 through July 31, 2016, so if you haven’t renewed your membership it’s time to so.

The Presidents’ Luncheon at each conference will provide a forum for the local presidents to meet and exchange information and ideas, and work towards becoming more effective leaders. Behind every successful organization are hardworking leaders.

We will be drawing five scrip tickets to five associations for the February 2016 Quarterly Conference. This is a great opportunity for an association to send a member who has not attended a conference before to have the experience and share that experience with others.

In February, there will be three openings on the California Certified Legal Secretary Certifying Board: two LSI members and one attorney/educator. If you have been toying with the idea of stepping up to volunteer, here is your opportunity. Being involved on the state level is rewarding on a professional level and a personal level. If being on the Certifying Board is of interest to you, take the opportunity this weekend to talk to some of the Certifying Board members about their duties and give it some thought. Contact me if you would like to serve or have questions.

In February, we will be accepting bids to host upcoming conferences: November 2017, February 2018, May 2018, and August 2018. The bids will be voted on at the Post-Annual Board of Governors meeting in May. You have plenty of time to discuss the possibility of hosting a conference with your association members, so please take advantage of this opportunity. Our Executive Secretary, Heather Edwards will be sending the bid information to you next month. Hosting a conference does involve some work, but it is one of the best ways to bring your association members together, bring in additional funds to your association, and enjoy showing off your area to other members of LSI.

Enjoy your conference weekend. Explore lovely downtown Riverside and what it has to offer! Take in some educational classes, network with other members, meet the Executive Committee and State Chairmen and enjoy yourselves!

Responding Associations: Alameda County; Conejo Valley; Desert Palm; Fresno County; Humboldt County; Long Beach; Los Angeles; Marin County; Merced County; Mt. Diablo; Orange County; Placer County; Rio Hondo; Riverside; Sacramento; San Diego; San Fernando Valley; San Francisco; San Gabriel Valley; San Mateo County; Santa Barbara; Santa Clara County; Stanislaus County; and Stockton-San Joaquin County
The Marketing Committee was established to coordinate the marketing of LSI and its programs, and to assist the local associations in their marketing endeavors. The members of the Marketing Committee include:

- Educational Program Coordinator: J. Cori Mandy, CCLS of San Diego LSA
- Advertising: Larry McGrew of San Francisco LPA
- California Certified Legal Secretary: Terrie Quinton, CCLS of San Diego LSA
- Social Media: Rod Cardinale, Jr. of Santa Clara County LPA
- Legal Specialization Sections Coordinator: Dawn R. Forgeur, CCLS of Sacramento LSA

As of the writing of this report, the Marketing Committee has not yet met. I will however, be able to present an oral report of our meeting during the Board of Governors Meeting on November 14, 2015.

Here is what we do know:

**LSI WEBSITE:** The Marketing Committee continues to monitor the website and will make any changes, updates, etc. as needed. If you find a link that doesn’t work, information that seems to be out of date or you find a correction that should be made, please let myself and Rod Cardinale, Jr. or Social Media Chair know and we will take care of it.

**MARKETING EVENTS:** This past quarter LSI attended the Bay Area Legal Forum (BALF) in September and California Association of Legal Document Assistants (CALDA) in October. Rod and I attended the BALF event and had moderate success. Cori Mandy, CCLS and Terri Quinton, CCLS attended the CALDA event in October. LSI was well received at the CALDA event.

**MARKETING TABLE:** A reminder that the components of your Marketing Toolbox are available at every conference. Ask a Marketing Committee member about these tools. They are a knowledgeable group. So stop by and see what we’ve got to help you market LSI and your local association. Remember: Any items ordered and paid for during any conference weekend (that are not on hand) will be shipped free of charge.

**JEWELRY:** Stay tuned for details regarding a Governors Pin.
**TOTE BAGS:** We are still selling the LSI Tote Bags - they are only $10 each (plus tax). They make great speaker gifts or gifts for your chairmen.

**LSS, CCLS and MEMBERSHIP BROCHURES (formerly the TRI-FOLDS):** Reminder - We have updated and revamped the Tri-Folds. They are now one page fliers that can be downloaded directly from the LSI website. You may also order them from the website. They continue to be free of charge to the local associations. We will have a small supply on hand at conference.

**REMINDER:** The Marketing Committee is ready, willing and able to assist you at any large events you may be putting on this year. If you’d like a representative from our committee to attend a large event, please let me know.

Very truly yours,

Jennifer L. Page, CCLS

/jlp

cc: Mary J. Beaudrow, CCLS LSI President
VICE PRESIDENT
2015-2016 SECOND QUARTERLY REPORT
Membership

November 14, 2015

I received a total of 22 responses to my directive - Thank you to those associations who took the time to submit responses. In my directive I asked if any associations had any Membership Drive events planned. Responses are as follows:

- Annual Membership Drive
- CLE workshops attract new members
- We use most local events as a way to encourage new members to join
- We find the personal approach to be the best

Now that the fiscal year is well underway, it appears that most associations are not planning any other formal membership drives. However, that should not stop you from being creative with reaching out to your local legal community and encouraging new members to join.

MEMBERS-AT-LARGE

The Members-at-Large Roster has been updated and was distributed prior to conference. Please remember to invite MAL’s near you to attend events your association is hosting.

CHAPTER ACHIEVEMENT CONTEST

The 2015-2016 Chapter Achievement Contest is in full swing and the Updated Contest Form is available on the LSI website. Start counting those points!

Very truly yours,

Jennifer L. Page, CCLS

/jlp

cc: Mary J. Beaudrow, CCLS LSI President

Associations who timely responded: Alameda County LSA, Beverly Hills/Century City LSA, Conejo Valley LPA, Desert Palm LPA, Fresno County LPA, Long Beach LPA, Marin County LPA, Merced County LPA, Mt. Diablo LPA, Orange County LSA, Placer County LPA, Rio Hondo District LPA, Riverside LPA, Sacramento LSA, San Diego LSA, San Fernando Valley LSA, San Francisco LPA, San Mateo County LSA, Santa Barbara LPA, Stanislaus County, Stockton-San Joaquin LPA. THANK YOU!
I received 18 responses to my Program Directive. Thank you to those associations who took the time to submit responses. Based on the responses I received, local associations continue to have great programs and events.

The following are topics local associations have scheduled for the upcoming quarter:

- Changes, etc. at LASC
- All about ESI
- Meeting with Various Court Administrators
- Sex Torts - Trying STD Claims
- LSI at its Best & Holiday Party
- Day in Court
- Holiday Partys
- Former JAG Officer to talk about his life in the military
- Legal Citations for Paralegals and Legal Secretaries
- Fall CLE Workshops: Ethics; the Trials of Litigation
- Productive Learning
- Civil Litigation – 100 Days Before Trial
- E-Discovery
- Civil Case Management Event
- A Different Way to Divorce – Collaborative Practice
- Placer County Court Updates
- Children and Family Services
- Anniversary and Boss Cum Laude Celebration
- Holiday Safety 101
- A Systematic Approach to Trial Preparation
- Identity Theft/Personal Safety
- The Death Penalty and High Profile Crimes
- Grandparents Rights

As you can see by the variety of topics above, some are fun, some are educational and some are probably very entertaining. Consider using some of these topics to plan your upcoming programs. Although education is one of the main goals of LSI, it’s important to have a little fun along the way. Get creative. Team up with another local association and have an interclub event. You don’t have to plan alone.
It’s important to remember that planning ahead is key to having a successful event or program. Make sure you have time to promote your event or program to the legal community around you. If you don’t already have a copy, I suggest you download LSI’s publication Guidelines for Preparation of a Legal Educational Program.

I look forward to hearing how successful your events are next quarter.

Very truly yours,

Jennifer L Page, CCLS

/jlp

cc: Mary J. Beaudrow, CCLS LSI President

Associations who timely responded: Beverly Hills/Century City LSA, Conejo Valley LPA, Desert Palm LPA, Fresno County LPA, Long Beach LPA, Marin County LPA, Merced County LPA, Orange County LSA, Placer County LPA, Rio Hondo District LPA, Riverside LPA, San Diego LSA, San Fernando Valley LSA, San Francisco LPA, San Gabriel Valley LSA, San Mateo County LSA, Santa Clara County LPA, Stanislaus County LPA.

THANK YOU!
INTER-ASSOCIATION
SECOND QUARTERLY REPORT 2015-2016

TO: LOCAL ASSOCIATION INTER-ASSOCIATION CHAIRMEN

Special thanks to the twenty-one (21) local associations who responded to the Second Quarter Directive, associations are listed below in alphabetical order. Again, I have included chair emails in the list of responding associations below so that local chairs may be able to make contact and network with each other about upcoming activities. Please also visit the LSI website to check for scheduled events so that your event does not conflict with others.

Thank you for your comments responding to my inquiry of why you believe that Inter-Association is still very important. Inter-Association is definitely the way to go! Please see a summary of local association comments below.

Local associations reported increased activity in the second quarter, events are listed below.

Second Quarter (August 1 through October 31):
Alameda County LSA/San Francisco/Sacramento - As Baseball Game & Tailgate Potluck
Beverly Hills/Century City LSA – LACoF Quarterly Meeting
Marin County/San Mateo/Santa Clara – Mary King Day at the Races, Golden Gate Fields
Los Angeles LSA/San Diego/San Fernando Valley – Viejas & Outlets Bus Trip
San Fernando Valley/San Gabriel Valley – CCLS Luncheon
Riverside LPA – LSI 2nd Quarterly Conference
Ventura County/Conejo Valley – Bosses Night

Third Quarter (November 1 through January 31):
January 12 – Conejo Valley/San Fernando Valley – Court Administrators’ Event
January 22 – Long Beach LPA – Day in Court/Court Clerks
January 26 – Rio Hondo District – Updates By 5 Court Administrators

Future Upcoming Events!
Ghost Gold Membership Drive – Mt. Diablo LPA

Please be reminded that as soon as you have scheduled an event, forward your flyer immediately to LSI Social Media Chair, Rod Cardinale, Jr., so that the information is posted on the LSI website.
### Reporting Associations (in alphabetical order):

<table>
<thead>
<tr>
<th>Association</th>
<th>Email:</th>
<th>Chair:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda County LSA</td>
<td><a href="mailto:bryana.schroder@juno.com">bryana.schroder@juno.com</a></td>
<td>Bryana Schroder, CCLS</td>
</tr>
<tr>
<td>Beverly Hills/Century City LSA</td>
<td><a href="mailto:carolekanter@yahoo.com">carolekanter@yahoo.com</a></td>
<td>Carole Kanter</td>
</tr>
<tr>
<td>Conejo Valley LPA</td>
<td><a href="mailto:zulustrike@outlook.com">zulustrike@outlook.com</a></td>
<td>Barbara Haussmann, CCLS</td>
</tr>
<tr>
<td>Desert Palm LPA</td>
<td><a href="mailto:gorham@sbemp.com">gorham@sbemp.com</a></td>
<td>Kathleen Gorham</td>
</tr>
<tr>
<td>Long Beach LPA</td>
<td><a href="mailto:amwccls@sbcglobal.net">amwccls@sbcglobal.net</a></td>
<td>Alice M. Widmark, CCLS</td>
</tr>
<tr>
<td>Marin County LPA</td>
<td><a href="mailto:kledwards@justice.com">kledwards@justice.com</a></td>
<td>Kristi L. Edwards, CCLS</td>
</tr>
<tr>
<td>Merced County LPA</td>
<td><a href="mailto:plsccls325@att.net">plsccls325@att.net</a></td>
<td>Lorraine Bettencourt, PLS, CCLS</td>
</tr>
<tr>
<td>Mt. Diablo LPA</td>
<td><a href="mailto:teezabee@yahoo.com">teezabee@yahoo.com</a></td>
<td>Teresa L. Beardsley</td>
</tr>
<tr>
<td>Orange County LSA</td>
<td><a href="mailto:lwaters36@gmail.com">lwaters36@gmail.com</a></td>
<td>Lori Waters</td>
</tr>
<tr>
<td>Placer County LPA</td>
<td><a href="mailto:censley@cotalawfirm.com">censley@cotalawfirm.com</a></td>
<td>Christie Ensley</td>
</tr>
<tr>
<td>Rio Hondo District LPA</td>
<td><a href="mailto:katrinks@msn.com">katrinks@msn.com</a></td>
<td>Kathy Martinez, CCLS</td>
</tr>
<tr>
<td>Riverside LPA</td>
<td><a href="mailto:2006ccls@gmail.com">2006ccls@gmail.com</a></td>
<td>Anna M. Brownson, CLA, CCLS</td>
</tr>
<tr>
<td>Sacramento LSA</td>
<td><a href="mailto:slprescott7@gmail.com">slprescott7@gmail.com</a></td>
<td>Lynne Prescott, CCLS</td>
</tr>
<tr>
<td>San Diego LSA</td>
<td><a href="mailto:mdtice@cox.net">mdtice@cox.net</a></td>
<td>Michelle D. Tice, CCLS</td>
</tr>
<tr>
<td>San Fernando Valley LSA</td>
<td><a href="mailto:mae.chester@hoganlovells.com">mae.chester@hoganlovells.com</a></td>
<td>Mae Chester, CCLS</td>
</tr>
<tr>
<td>San Francisco LPA</td>
<td><a href="mailto:shammer@firstlegalsupport.com">shammer@firstlegalsupport.com</a></td>
<td>Sue Hammer</td>
</tr>
<tr>
<td>San Gabriel Valley LSA</td>
<td><a href="mailto:annadukeslaw@tuckerellis.com">annadukeslaw@tuckerellis.com</a></td>
<td>Anna Maria Dukeslaw</td>
</tr>
<tr>
<td>San Mateo County LSA</td>
<td><a href="mailto:bjstensler@comcast.net">bjstensler@comcast.net</a></td>
<td>Bonnie J. Stensler, PLS, CCLS</td>
</tr>
<tr>
<td>Santa Barbara LPA</td>
<td><a href="mailto:ts@ppplaw.com">ts@ppplaw.com</a></td>
<td>Terri Collier-Stringer, CCLS</td>
</tr>
<tr>
<td>Santa Clara County LPA</td>
<td><a href="mailto:rodcardinaljejr@sbcglobal.net">rodcardinaljejr@sbcglobal.net</a></td>
<td>Rod Cardinal, Jr.</td>
</tr>
<tr>
<td>Stanislaus County LPA</td>
<td><a href="mailto:dianemecca@hotmail.com">dianemecca@hotmail.com</a></td>
<td>Diane M. Mecca</td>
</tr>
</tbody>
</table>
Why do you believe that hosting Inter-Association activities is still important?

- Always great to get to meet people from other associations and great to share ideas.
- Excellent networking.
- Because it is fun! And a great networking opportunity!
- Chapter achievement and networking.
- With the decline in membership in some associations, partnering with other local associations only makes sense. Sometimes, though when you are having trouble getting support from your members for your own association events, it is hard or impossible to interest them in events that are not local.
- It gives members of LSI an opportunity to get to know other LSI members in other associations.
- It gets associations together and communicating.
- It’s fun and a great way to meet other members. Also, it is a great way to network.
- It promotes commaderie and networking opportunities.
- You tend to get more people in attendance when you have joint meetings. Also, for a smaller association, it is nice to have an inter-association with a larger association because it gives the smaller association more exposure. Good opportunity to market your own association as well.
- You meet and deepen your friendship with other associations in a casual social atmosphere.
- It does foster good relations and a feeling of community and connectivity.
- I still believe that networking is key to one’s success. Inter-association events provide the opportunity to meet others that could, sometime in the future, be beneficial to you.
- I think having inter-association events are very important. It promotes supportive relationships between the sister associations.
- Interact with fellow LSI members, get new ideas from other associations.
- It is important because you get Chapter Achievement points. You get to meet other members of another association on a personal level. You raise money for your association.
- I recently went on the Sacramento hosted Reno Bus Trip and thoroughly enjoyed myself. Inter-Association events give us the opportunity to network, make new friends, share ideas for programs and events that will benefit our own association and better understand/appreciate what people in our profession are experiencing in their cities and counties. And you get a chance to see people that you otherwise might only see at conference. It a win-win!
- It is very important to be able to bond with others in the local community. Building those relationships could be very important when you need help, advise, or even a job.
- Great way to network and keep in contact with other LSI members – sharing experiences maintains relationships!
WAYS & MEANS
SECOND QUARTERLY REPORT 2015-2016

TO: LOCAL ASSOCIATION WAYS & MEANS CHAIRS

As always, let’s begin with the status of the LSI Ways & Means -- LSI purchased 150, 8gb flash drives shaped as a credit card with the LSI logo on it last year. A portion of the flash drives were allocated to LSS and CEC for speaker gifts, 68 of those were allocated towards Ways & Means. To date, we have sold 53; therefore we have 15 left. At this time, there are no plans to reorder this item, so purchase one while they are available – the price is $18 each. Special thanks to LSI Treasurer Lynne Prescott, CCLS, who provides accounting updates. We have sold 53 flashdrives thus far for a total of $954, with a net profit of $293.09. A special thank you to the Marketing Committee for their assistance with LSI Ways & Means!

I am pleased to report that local association Ways & Means activities are well on their way! A total of 21 responses were received -- reporting associations are listed below with their list of best events. I have included chair emails in the list of responding associations below so that local chairs may be able to make contact and network with each other about upcoming activities.

The following Ways & Means events reported during the Second Quarter:

<table>
<thead>
<tr>
<th>Reporting Association</th>
<th>Date/Event/Project</th>
<th>Net Income Reported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda County LSA</td>
<td>A’s Game &amp; Tailgate Party</td>
<td>$ 48.67</td>
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<tr>
<td>Beverly Hills/Century City</td>
<td>September Meeting</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>October Meeting</td>
<td>$ 6.00</td>
</tr>
<tr>
<td></td>
<td>LACoF Meeting</td>
<td>$109.00</td>
</tr>
<tr>
<td>Conejo Valley LPA</td>
<td>October - Two Session Education Seminar</td>
<td>Unknown at this time</td>
</tr>
<tr>
<td>Marin County LPA</td>
<td>October – Day at the Races</td>
<td>$ 25.00</td>
</tr>
<tr>
<td>Orange County</td>
<td>September Raffle</td>
<td>$ 44.00</td>
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<tr>
<td>Placer County</td>
<td>September Hike &amp; Lunch</td>
<td>$ 28.39</td>
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<tr>
<td></td>
<td>October Bunco Lunch</td>
<td>$1,336.40</td>
</tr>
<tr>
<td>Sacramento LSA</td>
<td>October Reno Bus Trip</td>
<td>$ Estimate over $800</td>
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<td></td>
<td>Member Meeting &amp; Raffle - Oct</td>
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<td>September Meeting</td>
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<td>75th Anniversary Celebration</td>
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<tr>
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<td>October Bake Sale</td>
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As you can see, the big money-maker for the Second Quarter was Stockton-San Joaquin County who hosted the LSI August 2015 Conference; however, coming in second place was Placer County with their October Bunco Lunch.

Upcoming Ways & Means events planned for **Third Quarter**:

- Alameda County – Day in Court – January 26, 2016
- Conejo Valley - Court Administrators Event – January 12, 2016
- Desert Palm – General Meeting, Sex Torts – November 10, 2015
- Desert Palm – Holiday Mixer – December 15, 2015
- Desert Palm – General Meeting – January 13, 2015
- Fresno County – 16th Annual Silent Auction & Breakfast Buffet – November 7, 2015
- Marin County – Educational Seminar for Attorneys & Legal Support Staff – November 7, 2015
- Orange County – Annual Baked Goods Auction – November 5, 2015
- San Fernando Valley – Annual Meeting with LA Court Administrators – January 12, 2016
- San Francisco – Silent Auction – December, 2015
- San Gabriel Valley – General Meeting – November 5, 2015
- San Gabriel Valley – General Meeting – January 7, 2016
- San Mateo County – Holiday Brunch & Silent Auction – December 6, 2015
- Santa Barbara – Holiday Party on December 1, 2015
- Santa Clara - Dinner Meeting – November 10, 2015
- Santa Clara – Dinner Meeting – December 8, 2015
- Santa Clara – Holiday Benefit Concert – December 12, 2015
- Stanislaus County – Annual Christmas Mystery Dinner – December 9, 2015
- Stockton-San Joaquin – Crab Feed – January 30, 2016
**Reporting Associations** (in alphabetical order):

<table>
<thead>
<tr>
<th>Association:</th>
<th>Email:</th>
<th>Chair:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda County LSA</td>
<td><a href="mailto:lindaam@gmail.com">lindaam@gmail.com</a></td>
<td>Linda Andrew Marshall</td>
</tr>
<tr>
<td>Beverly Hills/Century City</td>
<td><a href="mailto:carolekanter@yahoo.com">carolekanter@yahoo.com</a></td>
<td>Carole Kanter</td>
</tr>
<tr>
<td>Conejo Valley LPA</td>
<td><a href="mailto:zulustrike@outlook.com">zulustrike@outlook.com</a></td>
<td>Barbara Haussman, CCLS</td>
</tr>
<tr>
<td>Desert Palm LPA</td>
<td><a href="mailto:dplpa.info@gmail.com">dplpa.info@gmail.com</a></td>
<td>Erika Garduna</td>
</tr>
<tr>
<td>Fresno County LPA</td>
<td><a href="mailto:lkirlin@firstlegalsupport.com">lkirlin@firstlegalsupport.com</a></td>
<td>Larry Kirlin</td>
</tr>
<tr>
<td>Long Beach LPA</td>
<td><a href="mailto:amwcccls@sbcglobal.net">amwcccls@sbcglobal.net</a></td>
<td>Alice M. Widmark, CCLS</td>
</tr>
<tr>
<td>Marin County LPA</td>
<td><a href="mailto:agardner@freitaslaw.com">agardner@freitaslaw.com</a></td>
<td>Alison F. Gardner, CCLS</td>
</tr>
<tr>
<td>Merced County LPA</td>
<td><a href="mailto:plsccls325@att.net">plsccls325@att.net</a></td>
<td>Lorraine Bettencourt, PLS, CCLS</td>
</tr>
<tr>
<td>Orange County LSA</td>
<td><a href="mailto:mlgenova@att.net">mlgenova@att.net</a></td>
<td>Mary Lynn Genova</td>
</tr>
<tr>
<td>Placer County LPA</td>
<td><a href="mailto:maryayala44@yahoo.com">maryayala44@yahoo.com</a></td>
<td>Mary Ayala</td>
</tr>
<tr>
<td>Riverside LPA</td>
<td><a href="mailto:2006ccls@gmail.com">2006ccls@gmail.com</a></td>
<td>Anna M. Brownson, CLA, CCLS</td>
</tr>
<tr>
<td>Sacramento LSA</td>
<td><a href="mailto:crivera@somachlaw.com">crivera@somachlaw.com</a></td>
<td>Crystal Rivera</td>
</tr>
<tr>
<td>San Diego LSA</td>
<td><a href="mailto:freitas@orcblawfirm.com">freitas@orcblawfirm.com</a></td>
<td>Natalie N. Freitas</td>
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<tr>
<td>San Fernando Valley LSA</td>
<td><a href="mailto:laurelyn.bergfeld.ccls@gmail.com">laurelyn.bergfeld.ccls@gmail.com</a></td>
<td>Laurelyn P. Bergfeld, CCLS</td>
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<tr>
<td>San Francisco LPA</td>
<td><a href="mailto:scheryl-warr86@gmail.com">scheryl-warr86@gmail.com</a></td>
<td>Scheryl Warr</td>
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<tr>
<td>San Gabriel Valley LSA</td>
<td><a href="mailto:l.lane44@yahoo.com">l.lane44@yahoo.com</a></td>
<td>Linda Lane, CCLS</td>
</tr>
<tr>
<td>San Mateo County LSA</td>
<td><a href="mailto:sbajurin@gmail.com">sbajurin@gmail.com</a></td>
<td>Shara J. Bajurin, CCLS</td>
</tr>
<tr>
<td>Santa Barbara LPA</td>
<td><a href="mailto:nvasquez@rppmh.com">nvasquez@rppmh.com</a></td>
<td>Noemi Vasquez</td>
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<tr>
<td>Santa Clara County LPA</td>
<td><a href="mailto:josie@taltys.com">josie@taltys.com</a></td>
<td>Josie Amant</td>
</tr>
<tr>
<td>Stanislaus County LPA</td>
<td><a href="mailto:dianemecca@hotmail.com">dianemecca@hotmail.com</a></td>
<td>Diane Mecca</td>
</tr>
<tr>
<td>Stockton-San Joaquin County</td>
<td><a href="mailto:youngns@comcast.net">youngns@comcast.net</a></td>
<td>Colleen Young</td>
</tr>
</tbody>
</table>
Successful, well attended and most fun annual Ways & Means Events reported by local associations:

Alameda:  September Dinner Theatre Nite, Day in Court, Drawing prizes at Conferences, and the A's Game & Tailgate Party – always fun!

Beverly Hills/Century City: June District Court E-Filing/Tips & Tricks to Avoid Getting a Deficiency Notice.

Desert Palm:  Membership Drive was successful.

Fresno County:  Silent Auction held in November is our main event.

Long Beach:  Annual Day in Court, Joint Meeting with Rio Hondo District

Marin County:  May Educational Workshop Program. We combine the spring workshop with a membership drive.

Merced County:  Annual BBQ

Orange County:  Bake Sale, Holiday Auction, Raffles

Placer County:  Bunco Lunch in March & October are our big fundraisers.

Sacramento:  Reno Bus Trip, only W&M event held this year, lots of fun!

San Diego:  Our monthly member meetings are high in attendance. Our Wine Law MCLE was fun; however most rewarding was hosting LSI Conference.

San Fernando:  January Meeting with the LA Court Administrators, June E-Filing Seminar, CCLS Celebratory Lunch.

San Francisco:  Jersey night (profitable) Giants game fun! Great attendance of members and guests.

San Gabriel Valley:  Our Day at the Races in April and co-hosting CCLS Luncheon with San Fernando Valley.

Santa Barbara:  See’s Candy fundraiser.

Santa Clara:  Holiday Concert, Crab Feed and Baseball Get Together.

Stanislaus:  Annual Christmas Mystery Dinner

Stockton-San Joaquin:  Crab feed is most fun in January and bake sales. Hosting August 2015 Conference was very profitable.
October 28, 2015

PARLIAMENTARIAN SECOND QUARTERLY REPORT – NOVEMBER 2015

I would like to start by thanking each of the associations who responded to my Parliamentarian directive. I am pleased to report that I received 21 responses.

I’d like to thank those associations who responded – you provided some interesting responses. When asked if there were any parliamentarian related topics you would like addressed, I received the following:

- “I bought the Robert’s Rules of Order, newly revised, 11th Edition and [am] trying to figure out which sections that would really apply.”
  - **RESPONSE:** I would love to say that you only have to use a single chapter, but it turns out that your answers to various questions can be found throughout the book. However, if you are looking for a “cheat sheet” of sorts, you can always look at the tables in the back of the book. There is a chart for determining when each motion is in order, sample forms used in making motions (sample language), parliamentary steps, and other short cuts.

- “How can a parliamentarian effectively maintain order during a meeting? [For] example, there is a question on the floor (re an officer or chair report), and an inappropriate answer is given by the officer or chairperson which begins off topic discussions/comments/conversations.”
  - **RESPONSE:** Only the presiding officer/chairman has the right and duty to maintain order during a meeting. It is the duty of the presiding officer to open the meeting, announce the proper sequence of business that comes before the assembly, recognize members who are entitled to the floor, state and put to a vote all questions that legitimately come before the assembly as motions, to protect the assembly from obviously dilatory motions, enforce the rules relating to debate and those relating to order and decorum within the assembly, etc. (*Robert’s Rules of Order*, 11th Edition, at p. 450.) The parliamentarian’s role during a meeting is purely an advisory and consultative one – since parliamentarian law gives to the chair alone the power to rule on questions of order or to answer parliamentarian inquiries. (*Id.* at p. 465.) Should the President/Chair require assistance, the parliamentarian is there to assist, but ultimately, the final word comes from the President. Remember: *The Parliamentarian can assist, but not insist.*

- “Basics on whether or not to do motions or recommendations regarding secretary’s minutes and treasurer’s actions/reports.”
  - **RESPONSE:** This is a unique case in which the minutes were not prepared and/or lost and therefore have not been approved. In this particular case, it would be best to have them created and then appoint a special committee (perhaps of people who were at the particular meeting) to review the minutes and provide a recommendation to approve them. In this case, you would use a motion to adopt the recommendation, because a committee or reviewing body has done the preliminary review and is providing a recommendation to either the Board or the members to approve of what they have come up with. If you want an action to taken, you make a motion. For example: [the chair of the committee] *I move* (move is the key language to making a motion) to adopt the
recommendation that the general membership approve of the April 2015 general meeting minutes. As for the Treasurer’s reports, please keep in mind that you do not adopt the treasurer’s report; you approve them subject to audit. The financial records should always be audited either monthly or at the end of the fiscal year.

• “Why the parliamentarian is a board member – not just because the bylaws say so.”
  o RESPONSE: The parliamentarian is usually a member of the board to serve as an additional team member. The parliamentarian is a consultant and can quickly look items up and find references to rules and then provide that information to the chair. Having a parliamentarian can provide a huge assistance and relief to the President, the Board, and the members. Ultimately, however, it is up to the President to make the final decisions on matters. Not all local associations’ bylaws provide the parliamentarian the right to vote; some do and others do not. However, even if the parliamentarian does have the right to vote, they should abstain from voting in order to keep the perception of impartiality.

When asked what the most comment questions asked of you as a parliamentarian was, the responses were:
  • No one ever asks me a question. I can’t even get them to make a motion.
  • How motions are properly conducted
  • Questions regarding Bylaws
  • Mostly about motions and trying to get it right
  • If we have a quorum
  • Do we do a motion or a recommendation?
  • What is the wording for a motion?
  • Guiding through the motion process
  • Unfortunately, nobody asks questions
  • Do we need a motion?
  • How to deal with minutes when they are not available
  • Do we have a quorum?
  • How can we accomplish something or get approval for a proposed act by the Board?
  • When will our bylaws be revised?
  • Clarify intentions of or definition of a particular bylaw or standing rule
  • Questions regarding Standing Rules and Bylaws
  • Our association is small and informally run; there are very few parliamentary questions asked

I love that there was so much feedback and I totally appreciate it. I am also happy to see that some of you at the local level are receiving questions and are able to answer them for your members and your board. I’m sure you each provide an invaluable amount of support and assistance to your President, Board, and members. Congratulations and keep up the good work!

I hope that this report, along with the directive, helps you to continue your work as parliamentarian.

Sincerely,

Astrid B. Watterson, CCLS

____________________________
Astrid B. Watterson, CCLS
LSI Parliamentarian 2012-2016
November 14, 2015

PRC SECOND LSI QUARTERLY CONFERENCE REPORT

Happy Fall Everyone! As I write this report I am looking forward to setting my clock back, seeing the leaves turn color, and enjoying the cooler air.

The PRC Editors and Assistant Editors are hard at work editing the first revision of the Law Office Procedures Manual. The most recent update of the LOPM was shipped and you should have it by now. We are also working on the 2016 update of the LSI Legal Professionals Handbook. We expect to have both completed in January.

The royalties received for the period July 1 through September 30, 2015, total $45,851.94 broken down as follows:

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<tr>
<td>LPH - Total</td>
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TOTAL ROYALTIES

$45,851.94
We always welcome any suggestions you have for making the LPH, LOPM, and Instructor Guides better. Please remember to market these publications everywhere you can – at your next meeting, in articles that you write, the LSS newsletters, etc. The PRC appreciates your continued support to LSI by keeping your LPH and LOPM up-to-date.

Thank you for the opportunity to serve LSI.

MARIA BISHOP, CCLS
Editor-in-Chief

KAREN J. JONES
LINDA LANE, CCLS
Editor, Legal Professionals Handbook
Editor, Law Office Procedures Manual

PRC Committee:

Maria Bishop, CCLS, Editor-In-Chief
Karen J. Jones, Editor, LPH
Linda Lane, Editor, LOPM
Christine Flores, Assistant Editor

Linda Moore, CCLS, Assistant Editor
Lisa De La O, Assistant Editor
Betty Thomas, Assistant Editor
Pamela Schuld, Assistant Editor

Royalty History for LPH:
April 1 through June 30, 2011 - $2,287.84
July 1 through September 30, 2011 - $39,282.36
October 1 through December 31, 2011 - $(317.94)
January 1 through March 31, 2012 - $2,464.91
April 1 through June 30, 2012 - $2,555.95
July 1 through September 30, 2012 - $36,180.82
October 1 through December 31, 2012 - $(1,902.09)
January 1 through March 31, 2013 - $2,485.72
April 1 through June 30, 2013 - $42,693.03
July 1 through September 30, 2013 - $(1,126.09)
October 1 through December 31, 2013 - $2,571.01
January 1 through March 31, 2014 - $2,674.55
April 1 through June 30, 2014 - $50,576.41
July 1 through September 30, 2014 - $922.34
October 1 through December 31, 2014 - $2,796.45
January 1 through March 31, 2015 - $5,746.05
April 1 through June 30, 2015 - $3,541.07
July 1 through September 30, 2015 - $40,850.02

Royalty History for LOPM:
April 1 through June 30, 2011 - $(314.86)
July 1 through September 30, 2011 - $4,705.06
October 1 through December 31, 2011 - $18,869.31
January 1 through March 31, 2012 - $4,645.70
April 1 through June 30, 2012 - $18,216.38
July 1 through September 30, 2012 - $5,077.51
October 1 through December 31, 2012 - $17,233.12
January 1 through March 31, 2013 - $3,548.10
April 1 through June 30, 2013 - $17,448.52
July 1 through September 30, 2013 - $7,000.93
October 1 through December 31, 2013 - $17,000.81
January 1 through March 31, 2014 - $3,975.29
April 1 through June 30, 2014 - $18,479.69
July 1 through September 30, 2014 - $5,397.86
October 1 through December 31, 2014 - $17,116.54
January 1 through March 31, 2015 - $(3,388.60)
April 1 through June 30, 2015 - $14,433.53
July 1 through September 30, 2015 - $5,001.92
REPORT OF EDITOR, THE LEGAL SECRETARY
SECOND QUARTERLY REPORT

November 2015

Happy Fall! I would like to thank the 23 associations who responded to my Second Quarterly Directive. Thank you for your responses, your feedback is extremely important.

Most associations in addition to their bulletin send out separate meeting notices via email blasts, Evite, Constant Comment, and post on their websites. Bulletins are sent out on the average of 1 - 2 weeks prior to the meeting. Of those responding many bulletins are available on-line, one is on the members page updated weekly, one is their website and four do not publish a bulletin. Time spent to gather materials average 5 hours, with some associations spending 1 hour or less and others 10+ hours; input of information varies from 15 minutes to 10 hours; and sending out bulletin averages about 1-1/2 hours.

As always, I am looking forward to articles from local associations. If your association has scheduled an event, participated in an interclub or day-in court event, or if you want the spotlight to shine on your association, submit an article and photographs.

Those associations scheduled to submit articles for the February issue are: Placer County, Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley and San Mateo.

In addition, if you are an LSI Officer or Chairman and have not made your contribution, please keep in mind that time is running out. Don’t wait – submit an article for the February issue before the December 1st deadline.

Deborah Schmidt, CCLS
Editor, The Legal Secretary

Responding Associations: Alameda County, Conejo Valley, Desert Palm, Fresno County, Long Beach, Los Angeles, Marin, Merced County, Mt. Diablo, Orange County, Placer County, Rio Hondo District, Riverside, Sacramento, San Diego, San Fernando Valley, San Francisco, San Gabriel Valley, San Mateo County, Santa Barbara, Santa Clara County, Stanislaus County, Stockton-San Joaquin
November 4, 2015

SECOND QUARTERLY REPORT- EDUCATIONAL PROGRAM COORDINATOR

The CEC will be presenting Neil D. Okazaki, Deputy City Attorney for the City of Riverside, at its seminar on Friday night, November 13, 2015 at 5:15 p.m. Mr. Okazaki will be speaking on Sexual Harassment Law in California. If you have not signed up, there is still time!

The next online discovery class has just begun! If you are interested in this class or the Legal Secretary Training class, or any other online class, be sure to contact LSI’s Legal Secretary Training Chair, Shaylene Cortez, CCLS and she will hook you up!! We are pleased that the CCLS Study Guide has been updated! CCLS Chair Terrie Quinton, CCLS worked hard in getting this done and I thank Terrie for the accomplishment! Terrie will also be conducting a CCLS workshop at conference. This one is entitled “Ability to Communicate Effectively – Word Usage.” This class is a must if you are thinking about taking the CCLS exam. Actually, it is a great class to attend as a refresher course. Are you sending in your Court updates to LSI Procedure Chair Becky Neidhart? If not, please do. Even though Becky searches through all the court websites, it always helps to have extra eyes on what is happening!

I look forward to seeing you at conference!

Regards,

J. Cori Mandy, CCLS
Educational Program Coordinator
November 14, 2015

QUARTERLY REPORT

I received a total of eighteen responses to my November 2015 directive and thank the responding associations.

Based on the responses received, there are ten books being prepared. At this point, it appears that five scrapbooks are being created and five history books.

Three of the five historians preparing scrapbooks have previously served in the position of historian and all five historians preparing history books have previously served.

Hopefully all books being prepared will be on display at the annual conference in May 2016 for viewing and voting by the conference attendees for the presentation of a Members’ Choice Scrapbook Award and a Members’ Choice History Book Award.

Denise Lopes, CCLS
LSI Historian

The following associations responded and earned Chapter Achievement Points: Alameda County LSA, Beverly Hills/Century City LSA, Conejo Valley LPA, Desert Palm LPA, Long Beach LPA, Merced County LPA, Mt. Diablo LPA, Orange County LSA, Placer County LPA, Riverside LPA, San Diego LSA, San Fernando Valley LSA, San Francisco LPA, San Gabriel Valley LSA, San Mateo County LSA, Santa Barbara LPA, Santa Clara County LPA, and Stanislaus County LPA.
November Report of the Legal Specialization Sections

On September 24, 2015, the LSS teamed up with Altep to present a free webinar that was open to all members of LSI and the legal community, entitled “Social Media: Living and Litigating in a Digital Age” with speaker, David Grant. There were 93 people who signed up to attend! Mr. Grant was very well received and will be the speaker for the Law Office Administration Section Seminar on the topic of Cyber Security at this conference.

The second webinar was held on October 28, 2015, and was put on by the Transactional Law Section. The topic was “Trick or Treat? The Scary World of Nonprofits” with speaker Arthur Reiman, Esq. from the Law Firm for Non-Profits. There were 40 attendees signed up to attend this webinar and we instituted an electronic attendance sheet for those who needed MCLE and CCLS credit. This webinar was recorded and I hope to work with LSI to get those recordings online and available for possible purchase and obtaining CLE credits in the future.

I hope everyone who attended either webinar learned valuable information that they can use in their workplace or local association.

Please let us know on your evaluation forms if you have any suggestions for topics that would make a great webinar, the LSS Leaders always appreciate these suggestions from you!

If you have not signed up to attend a class at this conference, we are happy to accept walk-ins — $5 for Section Members and $20 for Non-Section Members. And if you’re going to pay $20 to attend that class, you may as well become a member of that Section for the same price instead and get the quarterly newsletters that come with membership!

November 2015 Quarterly Conference Seminars

<table>
<thead>
<tr>
<th>Family Law</th>
<th>Criminal</th>
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<tr>
<td>Wage Assignments: Having Your Ducks in</td>
<td>Medical Marijuana - California Cannabis Laws</td>
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<tr>
<td>a Row</td>
<td>Jason Ryan Thompson, Esq.</td>
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<th>Civil Litigation</th>
<th>Probate/Estate Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Civil Subpoena Laws for CA and UDSC -</td>
<td>Probate and Trust Administration 101</td>
</tr>
<tr>
<td>Business Records</td>
<td>Joseph Terrence Moynihan, Esq.</td>
</tr>
<tr>
<td>Jim Ayer</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transactional Law</th>
<th>Law Office Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing Business in CA - What types of</td>
<td>Cyber Security Basics - What you need to know</td>
</tr>
<tr>
<td>entities do we have?</td>
<td>to protect your data.</td>
</tr>
<tr>
<td>Tammy Manning Dickers, Sr. Paralegal</td>
<td>David Grant, JD, CIPP/US</td>
</tr>
</tbody>
</table>

Respectfully Submitted,

Dawn R. Forgeur, CCLS
Legal Specialization Sections Coordinator
Greetings Everyone,

I would like to thank everyone that responded to the Advertising Directive this quarter. I hope the information received is helpful to you and will contribute to the success of your program.

This time around, I asked each of association to provide information about the process of identifying and contacting potential advertisers, handling contracts and negotiating rates as well as enticing vendors to renew their commitment in supporting your program.

Attached you will find the information received. A special thanks to those that provided samples of their contract as well as rate information. I know it will be useful and very much appreciated. Keep in mind; we do have two individuals that volunteered to mentor anyone who would like some assistance and/or guidance.

Our mentors are:

- Annie Parrish – San Diego Legal Secretaries Association
- Sally Mendez Arevalo – San Francisco Legal Professionals Association

If you do not have their contact information, let me know and I will be happy to connect you.

Also, the holidays are approaching. If your association would like to get some exposure to your local community, you may want to consider supporting a charitable organization such as ‘Toys for Tots’ or ‘One Warm Coat.’ You can send an invitation to law firms in your area to help support your cause. This is an excellent opportunity to build your membership.

We have some new additions to the LSI Advertising Family. The November Issue of THE LEGAL SECRETARY was published and mailed out. We currently have 12 print advertisers:

- Barkley Court Reporters
- Behmke Reporting and Video Services
- Esquire Deposition Solutions
- First Legal Network
- Huseby.com
LSI Advertising Report - Third Quarter

- Kern Legal Services
- Knox Attorney Service
- Janney & Janney
- Redroman Creative
- The Rutter Group
- Translation by Design
- US Legal Support

Our web advertisers are:

- Ana Fatima Costa Certified Coach & Trainer
- Esquire Deposition Solutions
- First Legal Network
- Huseby.com
- Kern Legal Services
- Knox Attorney Services
- Janney & Janney
- US Legal Support

If you see any of these vendors at the conference, please be sure to thank them for their support. Also, please use their services when you can. I realize that some of your clients will require you to use specific vendors but if you can spare work from other cases, that would be great as our vendors spend lots of money to support LSI. Please be sure to let them know you saw their ad in our magazine and on our website.

If you have any information, feedback or would like to suggest a specific topic covered in a future directive, please let me know.

Respectfully,
LEGAL SECRETARIES, INCORPORATED

Larry McGrew
LSI Advertising Chair

Enclosures

cc: Mary Beaudrow, CCLS, LSI President
    Jennifer Page, CCLS, LSI Vice President
LSI Advertising Report - Third Quarter

Participating Associations (18):

<table>
<thead>
<tr>
<th>Alameda</th>
<th>Conejo Valley</th>
<th>Fresno</th>
<th>Long Beach</th>
<th>Los Angeles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marin</td>
<td>Merced</td>
<td>Placer</td>
<td>Rio Hondo</td>
<td>Riverside</td>
</tr>
<tr>
<td>Sacramento</td>
<td>San Diego</td>
<td>San Francisco</td>
<td>San Gabriel</td>
<td>San Mateo</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>Stanislaus</td>
<td>Desert Palm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

I. Identifying Potential Advertisers:

- Referral by members.
- Legal service providers.
- Vendor members.
- Referral from members, contact with new vendors at conference, direct contact from vendors.
- Relative vendors.
- Law firms and other entities that our members have a personal relationship.
- Meeting with community leaders and realtors.
- Maintain a vendor list.
- Contact vendors who support LSI.
- Interaction with legal community.
- Schmooze any legal provider and get their contact information.
- Vendors make contact and they are encouraged to participate. We help spread the word about their services through our newsletter and our website.

II. Contact is made by:

- Email or Telephone.
- Email, phone calls, flyers. We also invite potential advertisers to attend our monthly meeting and events so they can network and find out what we are all about.
- In person at meetings.
- Current member will work with contact at law firm.
- Mailing letters.
- At events, by email or direct contact.
- By mail, by email and in person.

III. Use of Contracts:

- 5 Associations do not use a contract.
- 8 do.
- 1 provides a flyer with the terms.
IV. Advertising Rates: Print & Web Rates or Flat Rate for both?

- 6 only provide Print Advertising.
- 7 only provide Web Advertising.
- A handful of associations offer both but have separate rates for each.
- Only 2 associations have a flat rate for both.

Rate information provided:

- $60 flat rate a year for a print ad and a link on website.

- Print Ad charge per issue. A discount is provided for 6 month and 12 month commitment.

- Print Ad Rates: $10 a month for business card sized in tiers up to $40 for a full page ad.

- Separate rate for each. We give rates for three months, six months and one year. We also have rates for different size ads.

- Annual Rates: Business card size - $50; ¼ page - $150; ½ page - $200; & full page - $300. Single issue rates (all per month): Business card size $10; ¼ page - $15; ½ page - $20; & full page $30.

- Long Beach has provided a copy of their print advertising rates.

- Web Rates: Home page $750; Membership page $450; Events & Employment pages $350; and Vendor page $250.

- Alameda has provided a copy of both their print and web advertising rates.

- San Francisco provides a copy of their contract that lists their Advertising Rates.

V. Renewal Process:

- Contact made by telephone to renew.
- A telephone call or email would be made inquiring if they would like to renew their Advertisement.
- Offers 1 year contract, a reminder is sent before the end of the year to the advertiser.
- A letter is sent to the advertiser to see if that advertiser would like to renew their contract, along with a new contract for the advertiser to sign.
- Contact is made to the vendor each fiscal year if they want to renew.
- Contact is made to the advertiser year to year.
LSI Advertising Report - Third Quarter

- By email, telephone, mail, talk to the rep at meetings.

VI. Information requested/comments:

- Excellent program for a starter member.
- How to approach and identify advertisers (FAQ or newbie guide).
- Santa Clara has been offering a vendor promotion program (Connect with SCCoLPA) for the past several years where for a flat fee they offer a free dinner at a membership meeting, the opportunity to speak and promote the business at the meeting, a one-year membership, and the vendor’s logo runs on their website for a year. They have had success with this program but requested pointers on how to attract more potential advertisers.
- San Diego provided information that most vendors prepare their next year’s budget during the fall months, so trying to get them to advertise in the winter or spring months doesn’t work too well. Also many of the decision making persons are on vacation during the summer, so renewals may get delayed.

Five of the responding associations currently do not have a program. The trend seems to be if a person is not available to chair the committee, there is no program. Just a friendly reminder, that some associations run a success program by committee. You can share the responsibility amongst your Board.

On a positive note, two of the responding associations are looking for information to build on their program. Rio Hondo has successfully created a program. Desert Palm in in the process of creating a program and has asked for information as well as sample contract along with Alameda. And Marin has requested information pertaining to how other associations handle updating their website as well as rate information for web advertising.

For those looking to create a website, there are web based platforms available that are economical that provide support. Links are provided below. In addition, if you would like some information from experts about these platforms, please go to: www.websitebuilderexpert.com.

- Wix.com is a free web based do it yourself platform.
- Weebly.com is another option for a free create your own website or online store.
- Squarespace.com has received great reviews as a website builder. There is a charge however you also get online support through this platform.

This completes the Advertising report for the second quarter.

Respectfully Submitted,
Larry McGrew
**Summary of Advertising Rates**

**NEWSLETTER:**

<table>
<thead>
<tr>
<th>Business Card:</th>
<th>Quarter Page</th>
<th>Half Page</th>
<th>Full Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20 month</td>
<td>$45 month</td>
<td>$60 month</td>
<td>$90 month</td>
</tr>
<tr>
<td>$25 month</td>
<td>$40 month</td>
<td>5% discount</td>
<td>10% discount</td>
</tr>
<tr>
<td>$25 month</td>
<td>$40 month</td>
<td>$60 month</td>
<td>$75 month</td>
</tr>
</tbody>
</table>

Free for members

Discount of 10 percent to advertisers contracting for 12 consecutive issues; 5 percent discount offered to advertisers contracting for 6 consecutive issues.

Discount for prepayment of 5 percent for 3 months; 10 percent for 6 months; 15 percent for one year.

**WEBSITE:**

- Home page: $750 year
- Membership page: $450 year
- Events page: $350 year
- Employment page: $350 year
- Vendor page: $250 year

[rates will be pro rated if started after May 1]
Advertising - Long Beach

The current advertising rates for ads placed in the Driftwood are:

<table>
<thead>
<tr>
<th>AD RATES:</th>
<th>1 month</th>
<th>3 months</th>
<th>6 months</th>
<th>1 year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Card (1/8 page)</td>
<td>$10</td>
<td>$25</td>
<td>$45</td>
<td>$85</td>
</tr>
<tr>
<td>Website Link</td>
<td>$10</td>
<td>$25</td>
<td>$45</td>
<td>$85</td>
</tr>
<tr>
<td>Quarter Page</td>
<td>$15</td>
<td>$40</td>
<td>$80</td>
<td>$150</td>
</tr>
<tr>
<td>Half Page</td>
<td>$30</td>
<td>$85</td>
<td>$150</td>
<td>$245</td>
</tr>
<tr>
<td>Full Page</td>
<td>$50</td>
<td>$150</td>
<td>$250</td>
<td>$450</td>
</tr>
</tbody>
</table>

If any of our readers or vendors are interested in placing an ad in this monthly publication, please contact:

Cathleen Siler  
c/o Atkinson Andelson Loya Ruud & Romo  
12800 Center Court Drive, Suite 300  
Cerritos, CA 90703  
Tel: 562-653-3407 - e-mail: mcsiler@yahoo.com

Please let our advertisers know you saw their ad in The Driftwood. Remember to support our advertisers - they support us.
San Francisco Legal Professionals Association

Return to:
Sally Mendez Arevalo
Hearsay Editor
P. O. Box 2582
San Francisco, CA 94126-2582
(415) 421-7151
smendez@altber.com
Taxpayer I.D. No.: 94-6079562

San Francisco Legal Professionals Association
ADVERTISING AGREEMENT 2015-2016

Advertiser's Name

Street Address

City, State, Zip

Telephone E-mail address

Please publish in THE HEARSAY, an 8 1/2" x 11" publication and on the SFLPA Website the following advertisement, at the following yearly rate:

- Full Page Front Inside Cover $500
- Full Page Back Outside Cover $500
- Full Page $475
- Half Page $325
- Quarter Page $150
- 1/8 Page $90

(Business card size)

Website Specs: 120x60 w/150 resolution.

THE HEARSAY will publish the advertisement on the basis of the last copy forwarded, or if none has been forwarded, it will publish the name, address and telephone of the advertiser as shown above.

We understand that:

1. This agreement is not transferable and will only cover advertising relating to the regular business of the advertiser and its privileges cannot be transferred in whole or in part to any other advertiser.

2. The location of the advertisement in THE HEARSAY shall be at the option of the publisher unless a specific arrangement is made for a special position.

3. If advertising is accidentally omitted or placed in a wrong location, no charge will be made therefor, but such errors shall not operate to abridge or cancel the remaining number of insertions due under this agreement.

4. THE HEARSAY is not responsible for any oral agreements or for any arrangement not expressed in this agreement.

ACCEPTED FOR
SAN FRANCISCO LEGAL PROFESSIONALS ASSOCIATION

By: __________________________
Sally Mendez Arevalo

DATE: __________________________

ADVERTISER'S NAME

By: __________________________

Title: __________________________

DATE: __________________________

Signature

Dated: __________________________
November 4, 2015

The October 2015 CCLS exam took place on October 17, and the Certifying Board is hard at work grading the exams. Please keep your fingers crossed for all examinees as they await their results!

In my directive, I asked if the local chairs had advised their association’s CCLS members that the Standards for Recertification have been updated and that on-line registration and payment for the CCLS exam are available on the LSI website. Several local chairs indicated they were not aware of these two facts. I ask that all governors please pass on to their local chairs any information that they get at conference, including reports.

I also asked if the chairs had any questions for me or the Certifying Board. One suggestion we received was that letters should be sent to the employer of the new CCLs, congratulating them on their employee’s passing of the exam. We also had a couple of questions regarding how local chairs can obtain materials for their local study groups. This topic has been discussed several times, and the decision has been that while I can provide guidance through the Officer/Chair Workshop Handouts and the handouts from CCLS Workshops, it is up to the individual chairs to prepare their own materials. I am always happy to provide suggestions as to what to prepare and provide some samples.

Finally, I asked if any of the local associations had a study group for the October exam, and how it went. Two local associations held study groups. Both reported that the groups went well, and the participants enjoyed the face-to-face aspect. One chair called it a great “team building” opportunity, and that it was great to work with the attendees and watch the three of them help each other. I encourage all local chairs to consider conducting a study group – it is a truly rewarding experience.

The CCLS workshop at this conference will be “Ability to Communicate Effectively – Word Usage.” Come to the workshop to learn how to choose the correct word or form of word to use in your communications.

Respectfully submitted,

Terrie Quinton, CCLS
California Certified Legal Secretary Chairman

Associations Responding to Directive: Alameda County LSA; Beverly Hills/Century City LSA; Conejo Valley LPA; Desert Palm LPA; Long Beach LPA; Marin County LPA; Merced County LPA; Mt. Diablo LPA; Orange County LSA; Placer County LPA; Rio Hondo District LPA; Sacramento LSA; San Diego LSA; San Fernando Valley LSA; San Francisco LPA; San Gabriel Valley LSA; San Mateo County LSA; Santa Barbara LPA; Santa Clara County LPA; Stanislaus County LPA
As I mentioned in my directive, I will make a formal motion at the November Quarterly Conference to have the existing Eula Mae Jett Scholarship Program Plan of Administration approved for the 2016-2017 scholarship year. Copies of the Plan and miscellaneous forms are attached to my report. As we make our way through the holidays and into the scholarship season, please be sure to review the attached documents and familiarize yourself with them. As always, please contact me if you have any questions.

Thank you to Orange County LSA, San Diego LSA and Stanislaus County LPA for sharing their scholarship forms with me. Mt. Diablo LPA and Placer County LPA indicated that they will be sending forms to me in the near future. If you would like copies of the sample forms, please let me know.

I would like to give a special shout-out to Dalia Liang of Alameda County LSA. Dalia is a new scholarship chair and she has been going full steam ahead since day one, keeping in regular contact with me about her progress. In addition to collecting contact information for the colleges and business schools in her area and preparing letters and forms, Dalia has been looking into new ways to spread the scholarship word. She researched third party scholarship web sites and approached me to see if LSI would be willing to post its scholarship plan and forms on some of those sites. The Executive Committee has approved posting on third party web sites and I will be working with Dalia over the next few months to make that happen. Way to go Dalia!

I encourage all of you to share your ideas with me and with each other. Don’t be afraid to think outside of the box and make suggestions. Let’s continue to work together to spread the scholarship word.

See you in Riverside!
EULA MAE JETT SCHOLARSHIP PROGRAM

PLAN OF ADMINISTRATION

1. Legal Secretaries, Incorporated (hereinafter “LSI”) offers scholarships to persons desiring a career in the legal field. A career in the “legal field” shall be interpreted and defined as follows: (i) legal secretary; (ii) legal assistant (including paralegal); (iii) court reporter; and (iv) law office administrator. Scholarships are not intended for students planning to enter law school. All applicants must be legal residents of the State of California, must be attending school within the State of California during the scholarship year, and must be enrolled in a program of no less than six months in duration.

2. Each scholarship year shall be from September 1 through August 31 of the ensuing year (e.g., September 1, 2016 through August 31, 2017). Except as otherwise provided to the contrary, all references to dates herein are to those dates within a scholarship year.

3. Members of LSI are not eligible for LSI scholarships. Relatives of LSI members are eligible as long as they meet the criteria as set forth herein.

4. Upon written request to the LSI Scholarship Chair on October 1 or later, the LSI Scholarship Chair shall furnish a copy of the Eula Mae Jett Scholarship Program Plan of Administration (hereinafter “Plan”), together with forms of application, to the Governor and the Scholarship Chair of each local association (hereinafter “association”) who are unable to download the Plan and forms from the LSI web site.

5. Each association desiring to participate in the scholarship program shall advise schools in its respective area of the availability of the scholarships to be awarded by LSI.

6. Each association may distribute as many applications locally as it desires for each Plan. Applicants must present applications and accompanying documents to the local sponsoring association by the due date determined by the sponsoring association.

7. Each sponsoring association shall select one application per Plan (for a total of up to three applications) to be forwarded to the LSI Scholarship Chair for consideration. Only the original application and its accompanying documentation should be submitted; it is not necessary to submit any additional copies.

8. Applications and accompanying documentation should be typewritten and on current forms, and should include an unofficial school transcript. LSI reserves the right at any time to request an official transcript from the applicant. “Official transcript” shall be defined as transcripts printed on original school letterhead. A copy of the transcript may be accepted if it contains either an embossed school seal or certification identifying the copy as a true copy of the original transcript. If a recent school transcript is not available (e.g., in the case of a career
change student), the applicant should make efforts to obtain a transcript from the last school attended or provide an explanation as to why a transcript is not being provided.

9. The applicant’s biographical letter should state the reasons why the applicant should receive a scholarship, the academic achievements of the applicant (including any academic or non-academic honors or awards), the applicant’s motivation to pursue a career in the legal field, the applicant’s future goals, and the applicant’s financial need. Letters should be typewritten and addressed “To Whom it May Concern.”

10. Letters of recommendation should be from someone other than a family member or a member of LSI (e.g., long-term family friend, teacher, school counselor, employer, or co-worker) and should contain the author’s relationship to the applicant. Additional items to include in the letter are a description of the applicant’s personal traits (character, personality, and goals) and the applicant’s school or work experience and ethic. Letters should be typewritten and addressed “To Whom it May Concern.”

11. All applications submitted to the LSI Scholarship Chair via U.S. Mail must be postmarked no later than April 1. All applications submitted via overnight delivery (e.g., UPS or Federal Express) must be shipped no later than April 1. Applications and accompanying documents submitted with a postmark or shipping date of April 2 or later shall be disqualified without notification.

12. Applicants may submit applications and accompanying documents directly to LSI ONLY when there is no local association to sponsor the applicant. Should applicants present their application and accompanying documents directly to LSI and a local association is available to sponsor the applicant, the LSI Scholarship Chair will immediately notify the applicant and the local association (scholarship chair, President or Governor) to resolve the matter. If the local association agrees to sponsor the applicant but the applicant chooses not to provide the requested documentation to the local association, the applicant shall be deemed to be disqualified for a LSI scholarship. All correspondence between LSI, the applicant, and the local association regarding the matter must be in writing in order to avoid any miscommunications.

13. Prior to April 1, the LSI Scholarship Chair shall appoint three (3) or more judges to review the applications and select the winners and alternates. The panel of judges may be comprised of educators, lawyers, judges, and/or civic leaders. The LSI Scholarship Chair shall act as an advisor and non-voting member of the judging panel.

14. The scholarships shall be awarded based upon the following, which the judges, in reaching their decisions, shall take into consideration: (a) the applicant’s desire for a career/position in the legal field; (b) the academic achievement of the applicant; (c) the financial need of the applicant; and (d) the personal characteristics, aspirations, and goals of the applicant.

15. On or before May 1, each judge shall advise the LSI Scholarship Chair of the points given to each application. From the totals of the points given by the three judges, the LSI Scholarship Chair shall determine two winners and two alternate winners in each of the three.
Plans. The scholarship winners and sponsoring associations shall be announced at the LSI Annual Conference in May (e.g., May 2016).

16. Scholarship awards shall be given as follows:

Plan A – High School Senior (two awards of $1,500 each)

Applicants shall be restricted to seniors who will have successfully completed high school by the end of June and will be enrolled in the fall semester immediately following the school year in a college or business school offering a course of study in the legal field. All applicants must be legal residents of the State of California and must be attending school within the State of California during the scholarship year.

Plan B – College Student (two awards of $1,500 each)

Applicants shall be restricted to students who will have completed at least one year of college by June of the school year, and who will be enrolled in the fall semester immediately following the school year in a college or business school in a course of study in the legal field, until all such courses have been taken to satisfy the requirements for a degree or certificate in said legal related program. All applicants must be legal residents of the State of California and must be attending school within the State of California during the scholarship year.

Plan C – Career Change Student (two awards of $1,500 each)

Applicants shall be restricted to students who will be enrolled in the fall semester in a college or business school in a course of study in the legal field and shall be an individual who either (a) desires to re-enter the workforce after a prolonged absence but requires training or specialized education in order to qualify as a candidate for a position in the legal field; or (b) has been in the workforce for a number of years but desires to enter the legal field and wants to receive the training or specialized education needed to do so. All applicants must be legal residents of the State of California and must be attending school within the State of California during the scholarship year.

17. Students may apply as many times as they wish, but may only win once. Once an applicant has won either first or second place in any category, he or she may not apply again, even if the applicant forfeited the scholarship award. If an applicant is chosen as an alternate and receives any portion of a scholarship award due to forfeiture, he or she may still re-apply and may receive the full scholarship if chosen as a first or second place winner in any category.

18. Payments of the scholarship awards shall be made as follows:

(a) If the recipient enrolls in a school offering a concentrated course (e.g., six to nine months) in the legal field, not having any divisions into semesters or sessions, the scholarship shall be paid one-half (1/2) upon furnishing proof of enrollment in the school, and one-half (1/2) upon furnishing proof of successful completion of the
course, or continued attendance for one year from the date proof of enrollment was furnished, whichever is sooner.

(b) If the recipient enrolls in a school in which the school year is divided into two (2) semesters, the scholarship shall be paid one-quarter (1/4) upon furnishing proof of enrollment in the fall semester immediately following the school year, one-half (1/2) upon furnishing proof of successful completion of the fall semester and enrollment in the spring semester immediately following the school year, and one-quarter (1/4) upon furnishing proof of successful completion of the spring semester immediately following the school year.

(c) If the recipient enrolls in a school in which the school year is divided into three (3) sessions, the scholarship shall be paid one-third (1/3) upon furnishing proof of enrollment in the fall session immediately following the school year, one-third (1/3) upon furnishing proof of successful completion of the fall session and enrollment in the winter session immediately following the school year, and one-third (1/3) upon furnishing proof of successful completion of the winter session and enrollment in the spring session immediately following the school year.

19. The LSI Scholarship Chair shall request proof of enrollment and/or successful completion under 16(a), (b), or (c) above, which shall be received by dates specified by the LSI Scholarship Chair. Failure to furnish proof of enrollment and successful completion under 16(a), (b) or (c) above by the required dates shall result in a forfeiture of the entire award or a portion of the award, as recommended by the LSI Scholarship Chair to the LSI Executive Committee.

20. Proof of enrollment shall consist of the following:

(a) If the recipient enrolls in a school offering a concentrated course (as described in 14(a) above) in the legal field not having any divisions into semesters or sessions, the recipient shall provide a copy of his or her schedule of classes for the concentrated course and a copy of the enrollment agreement or such other contract as the recipient may enter into with the school for such concentrated course.

(b) If the recipient enrolls in a school in which the school year is divided into two (2) semesters or three (3) sessions, the recipient shall provide a copy of his or her schedule of classes for the semester/session as distributed by the school at the time of the recipient’s registration.

21. Proof of successful completion shall consist of a copy of whatever form of “grading” the school in which the recipient is enrolled distributes upon completion of the classes and/or subjects the recipient took during the specified time period, indicating that the recipient received credit for the classes.
22. Failure to furnish proof of successful completion of the fall semester and enrollment in the spring semester within fifteen (15) days after the enrollment in the spring semester immediately following the school year, under 16(b) above, will result in the forfeiture of the remaining three-quarters (3/4) of the award. Failure to furnish proof of successful completion of the fall session and enrollment in the winter session within fifteen (15) days after enrollment in the winter session immediately following the school year, under 16(c) above, will result in a forfeiture of the remaining two-thirds (2/3) of the award. Failure to furnish proof of successful completion of the winter session and enrollment in the spring session within fifteen (15) days after enrollment in the spring session immediately following the school year, under 16(c) above, will result in a forfeiture of the remaining one-third (1/3) of the award.

23. If a scholarship recipient chooses not to continue in school for the entire year (or the entire term of the concentrated course as described in 16(a) above), he or she shall forfeit the entire award (or a portion of the award, as recommended by the LSI Scholarship Chair to the LSI Executive Committee), and the scholarship (or the remainder of the scholarship) shall pass to an alternate. If a scholarship recipient is unable to continue in school for the entire year (or the entire term of the concentrated course) through no fault of his or her own (e.g., the school loses its accreditation), the recipient shall immediately notify the LSI Scholarship Chair, who will make a recommendation to the LSI Executive Committee.

24. If a scholarship recipient does not enroll within the allotted time, and the scholarship passes to an alternate, such alternate, if unable to be admitted into the fall semester/session after making application to do so, shall be eligible for the scholarship for the next semester/session, being the first opportunity when admittance can be gained to the school of the student’s choice.

25. If a student fails to timely enroll for any semester/session, the scholarship shall pass to the next alternate who shall be bound by the same rules above. If an alternate has already enrolled in a school at the time he or she is advised of the scholarship award, such award may be paid directly to the recipient for that semester/session, or in the event he or she is enrolled in a school offering a concentrated course in legal training not having any division into semesters or sessions, the full or remaining portion of the scholarship, as the case may be, may be paid directly to the recipient pursuant to the rules set forth in paragraph 16 above.

26. Recommendations by the LSI Scholarship Chair and subsequent decisions by the LSI Executive Committee are final.
EULA MAE JETT SCHOLARSHIP APPLICATION

NAME OF APPLICANT: _______________________________________________________

ADDRESS: ___________________________________________________________________

PHONE: ______________________________________________________________________

EMAIL: ______________________________________________________________________

SPONSORING ASSOCIATION SUBMISSION DEADLINE: _________________________________

SUBMITTED UNDER PLAN: ___________________ DATE: ____________________________
(Plan A – HS Senior; Plan B – College Student; Plan C – Career Change Student)

SIGNATURE OF APPLICANT: ____________________________________________________

*************************************************************************************************

Legal Secretaries, Incorporated (hereinafter “LSI”) offers scholarships to persons desiring a career in the legal field. A career in the “legal field” shall be interpreted and defined as follows: (i) legal secretary; (ii) legal assistant (including paralegal); (iii) court reporter; and (iv) law office administrator. Scholarships are not intended for students planning to enter law school. All applicants must be legal residents of the State of California, must be attending school within the State of California during the scholarship year, and must be enrolled in a program of no less than six months in duration.

Members of LSI are not eligible for LSI scholarships. Relatives of LSI members are eligible as long as they meet the criteria as set forth in the Plan of Administration.

The application and accompanying documentation (see checklist) should be typewritten and on current forms. An original, signed application must be submitted. Applications via fax or email are not accepted.

(November 2015)
EULA MAE JETT SCHOLARSHIP APPLICATION CHECKLIST

NAME OF APPLICANT: _______________________________________________________

SPONSORING ASSOCIATION: ____________________________________ LSA LPA

SPONSORING ASSOCIATION SUBMISSION DEADLINE: _______________________

SUBMITTED UNDER PLAN: _____________ DATE: _______________________

BIOGRAPHICAL LETTER FROM APPLICANT
Letter should state the reasons why applicant should receive a scholarship, academic achievement of the applicant, applicant’s motivation to pursue a career in the legal field, applicant’s future goals, and applicant’s financial need. The letter should be typewritten on 8.5” x 11” paper and addressed “To Whom it May Concern.”

THREE LETTERS OF RECOMMENDATION
Letters of recommendation should be from someone other than a family member or a member of LSI (e.g., long-term family friend, teacher, school counselor, employer or co-worker) and should contain the author’s relationship to the applicant. Additional items to include in the letter are a description of the applicant’s personal traits (character, personality and goals) and the applicant’s school or work experience and ethic. Letters should be typewritten on 8.5” x 11” paper and addressed “To Whom it May Concern.”

UNOFFICIAL SCHOOL TRANSCRIPT
LSI reserves the right at any time to request an official transcript from the applicant. “Official transcript” shall be defined as transcripts printed on original school letterhead. A copy of the transcript may be accepted if it contains either an embossed school seal or certification identifying the copy as a true copy of the original transcript.

RESUME (Plan C only)
The resume should list applicant’s legal and/or secretarial experience, if any. Resume must include dates of employment, employer name and address, position, and reason for leaving.
EULA MAE JETT SCHOLARSHIP COVER SHEET

TO BE COMPLETED BY THE SPONSORING ASSOCIATION
AND ATTACHED TO EACH APPLICATION FOR SCHOLARSHIP

SUBMITTED BY: ________________________________________________       LSA     LPA

SUBMITTED UNDER PLAN: _______________  DATE: _____________________

HAS YOUR LOCAL ASSOCIATION PAID PER CAPITA TO LSI FOR THIS APPLICANT?
YES          NO

NAME, ADDRESS, TELEPHONE NUMBER AND EMAIL ADDRESS OF APPLICANT:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

NAME, ADDRESS, TELEPHONE NUMBER AND EMAIL ADDRESS OF SPONSORING
ASSOCIATION SCHOLARSHIP CHAIR (OR LOCAL PRESIDENT, IF NO CHAIR):
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

NAME, ADDRESS, TELEPHONE NUMBER AND EMAIL ADDRESS OF SPONSORING
ASSOCIATION GOVERNOR:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

All applications submitted to the LSI Scholarship Chair via U.S. Mail must be postmarked no later than April 1. All applications submitted via overnight delivery (e.g., UPS or Federal Express) must be shipped no later than April 1. Applications and accompanying documents submitted with a postmark or shipping date of April 2 or later shall be disqualified without notification.

(November 2015)
EULA MAE JETT SCHOLARSHIP PROGRAM

FREQUENTLY ASKED QUESTIONS

1. **Who is eligible for a scholarship?**

LSI offers scholarships to persons desiring a career in the legal field. A career in the “legal field” shall be: (i) legal secretary; (ii) legal assistant (including paralegal); (iii) court reporter; and (iv) law office administrator. Scholarships are not intended for students planning to enter law school. *All applicants must be legal residents of the State of California, must be attending school within the State of California during the scholarship year, and must be enrolled in a program of no less than six months in duration.* Members of LSI are not eligible for LSI scholarships. Relatives of LSI members are eligible as long as they meet the criteria as set forth in the Plan of Administration.

2. **Where can I get instructions and forms to apply for a scholarship?**

The Plan of Administration, as well as the forms of application, are available on the LSI web site (www.lsi.org).

3. **Where do I send my application?**

Applicants must present applications and accompanying documents to the local sponsoring association by the due date determined by the sponsoring association. If it is determined that there is no local association available to sponsor an applicant, the applications and accompanying documents shall be submitted to the LSI Scholarship Chair no later than April 1. Email the LSI Scholarship Chair at emjscholarship@gmail.com to obtain the current mailing address.

4. **When is the application deadline?**

Application deadlines are determined by the local sponsoring association.

5. **What if there is no local association in my area?**

Applicants should contact the LSI Scholarship Chair to confirm that there is no local association to sponsor the applicant. Only if there is no local association may an applicant submit his or her application and accompanying documents directly to LSI. Bypassing the local association will subject the applicant to disqualification. Applications submitted directly to LSI must be postmarked no later than April 1.
6. **Who can write a letter of recommendation for me?**

Letters of recommendation should be from someone other than a family member or a member of LSI (e.g., long-term family friend, teacher, school counselor, employer, or co-worker) and should contain the author’s relationship to the applicant.

7. **How many scholarships are awarded by LSI?**

LSI awards two scholarships ($1,500 each) under three different plans. The scholarship winners are announced at the LSI Annual Conference held in May of each year (e.g., May 2016).

8. **What are the scholarship plans?**

Plan A – High School Senior; Plan B – College Student; and Plan C – Career Change Student.

9. **I am a college student. What is the difference between Plan B and Plan C, which both apply to college students?**

In a nutshell, Plan B is for first time around college students and Plan C is for students who have already been in the workforce for a number of years and who are going back to school for a career change.

10. **Who do I contact with additional questions?**

This is a brief summary of answers to frequently asked questions. Please see the formal Plan of Administration (November 2015) for complete answers to your questions. Additional questions should be directed to the sponsoring association Scholarship Chair or the LSI Scholarship Chair (emjscholarship@gmail.com).
November 1, 2015

LEGAL PROCEDURE 2015 NOVEMBER QUARTERLY REPORT

Thank you to the nineteen associations who answered my October Directive.

I am happy to report several people have noticed (and appreciated) the combined Blog email notifications. Previously, emails were sent per an entry as they were posted.

NOTE: Numerous court/government websites continue to post warnings regarding email and telephone scams regarding failure to appear for jury duty, outstanding tax balances and fictitious lawsuits. Please inform your association members, as well as your family and friends, to avoid becoming a victim to these fraudulent activities.

Please continue sending local updates from your courts as well as your association’s newsletters/bulletins.

Sincerely,

Becky J. Neidhardt

Becky J. Neidhardt
LSI Legal Procedure Chairman

ASSOCIATIONS RESPONDING TIMELY TO DIRECTIVE: Alameda County LSA, Beverly Hills/Century City LSA, Conejo Valley LPA, Desert Palm LPA, Livermore-Amador Valley LPA, Marin County LPA, Merced County LPA, Mt. Diablo LPA, Orange County LSA, Rio Hondo District LPA, Riverside LPA, Sacramento LSA, San Diego LSA, San Francisco LPA, San Gabriel Valley LSA, San Mateo County LSA, Santa Clara County LSA, Stanislaus County LPA, Stockton-San Joaquin County LPA

LSI – Educating California’s Legal Professionals
Second Quarterly Report

November 2015

LSI’s Beginning Legal Secretarial Training class started September 14. We only had 13 students this time around, 4 of which were members. The class still generated $2,400 in revenue this quarter. I inquired of students about how they found our class. Most said they saw it in their local association newsletter. Some said they went on the LSI website to obtain information, but had a difficult time as it seemed to be buried in the website. Others stated that, although they are LSI members, they had no idea we offered the class. The next class will be offered January 11, 2016, and the registration form is attached to this report.

Next, the California State Court Discovery Class began November 2. We have 28 students registered. Most are members, with 8 being non-members. The class generated approximately $970. We will be offering this class again in the spring, currently set for March 14, 2016.

As I stated previously, once I am able to get through the November conference, we plan to do additional class topics, as well as freebie classes for members. In response to my directive, associations replied that they would like to see more federal court content since many offices are doing more federal court filings. Others mentioned Adobe and e-filing/service topics.

In addition, we will be updating the Legal Secretary Reference Guide. Associations stated they would like to see this “modernized,” with a section included on discovery basics.

Thank you to the associations below for responding to my directive. If you have any questions or need any assistance with your training classes, please contact me.

Respectfully submitted,

Shaylene Cortez, CCLS

Responding Associations:

Alameda County LSA
Beverly Hills/Century City LSA
Conejo Valley LPA
Desert Palm LPA
Long Beach LPA
Marin County LPA
Merced County LPA

Mt. Diablo LPA
Orange County LSA
Placer County LPA
Rio Hondo LPA
Riverside LPA
Sacramento LSA
San Diego LSA

San Fernando Valley LSA
San Francisco LPA
San Gabriel Valley LSA
San Mateo LSA
Santa Barbara LPA
Santa Clara County LSA
Stockton-San Joaquin County LPA
LSI will be offering its Beginning Legal Secretarial Training Class online. This class will be an eight-week, work-at-your-own-pace online session commencing January 11 and ending March 7, 2016. During the classes, the following topics will be covered:

- Introduction to the Law Office
- Duties of the Legal Secretary
- Effective Telephone Skills
- Effective Oral Communication Skills
- Effective Written Communication Skills
- Calendaring and Timetables
- Basic Grammar Skills
- Transcription and Proofreading Techniques
- Court Structure
- Citations
- Service of Legal Documents
- Preparing a Proper Caption
- Preparation of Documents Filed with the Court
- Basics of Civil Litigation

**CLASS SESSION OPENS ON MONDAY, JANUARY 11, 2016**

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

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

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**BEGINNING LEGAL SECRETARIAL TRAINING CLASS REGISTRATION**

(Please type or print clearly)

Name: ___________________________ Email: ___________________________
Address/City/Zip: ___________________________
Telephone: ___________________________ Association: ___________________________ LSA/LPA

$150 LSI Member______      $200 Non-LSI Member_______

Payment:  Check #________ (made payable to LSI)
(Note: Checks must clear before books will be mailed and may cause a delay in access to the class.)

Visa/MC Credit Card #
Exp. Date: _______ 3-digit CVV No.: ________ Zip Code: ________

Email registration form NO LATER THAN January 4, 2016, to Shaylene Cortez, CCLS, LSI Legal Secretarial Training/Seminar Chair, training@lsi.org or mail to LSI (see website for mailing address). Registration will also be offered online at www.lsi.org with PayPal. Keep in mind books will not be mailed until registration is processed. For further information or inquiries, email training@lsi.org. No refunds after January 12, 2016.

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

- Interrogatories
- Demand for Production of Documents
- Requests for Admissions
- Depositions
- Demand for Physical Examinations
- Deposition Subpoenas
- Discovery Timelines and Service
- Verifications

**CLASS SESSION OPENS MONDAY, MARCH 14, 2016**

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

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

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

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**OVERVIEW OF CALIFORNIA STATE COURT DISCOVERY CLASS REGISTRATION**

(Please type or print clearly)

Name: __________________________ Email: __________________________
Address: __________________________ City/Zip: __________________________
Telephone: __________________________ Association: __________________________

$30 LSI Member_______ $50 Non-LSI Member_______

Payment: Check #________
Visa/MC Credit Card #________________________
Exp. Date: _______ 3-digit CVV No.: _______ Zip Code: _______

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

LSI – Educating California’s Legal Professionals
NOVEMBER 2015

DAY IN COURT – SECOND QUARTERLY REPORT

The following associations timely responded to my directive: Alameda LSA; Beverly Hills/Century City LSA; Conejo Valley LPA; Desert Palm LPA; Fresno County LPA; Long Beach LPA; Los Angeles LSA; Marin County LPA; Merced County LPA; Mt. Diablo LPA; Orange County LSA; Placer County LPA; Riverside LPA; Sacramento LSA; San Diego LSA; San Fernando Valley LSA; San Gabriel Valley LSA; San Mateo County LSA; Santa Barbara LPA; Santa Clara County LPA; Stanislaus County LPA.

Thank you to all associations who responded to my directive this past quarter. The majority of the associations are scheduling their Day-in-Court event for January or February. Court personnel have been asked to discuss the new court rules, judicial council forms, and court policies that will be implemented during the upcoming year. Many associations have asked the same court personnel to be speakers on a yearly basis.

I have had a few associations report that they incorporate LSI’s mock trial scripts in their January or February Day-in-Court events. I am thrilled that the mock trial scripts are being utilized by the associations to bring humor into their meetings. There was one request for a Valentine theme script. Unfortunately no one has written a script for my characters - Cupid and/or the ever mischievous Leprechaun.

One association hosts a yearly Murder Mystery Dinner in December instead of their regular meeting. The surrounding associations are invited to attend and be cast members. What a great idea to develop goodwill with the surrounding associations and other legal organizations.

One association schedules two Day-in-Court events. The January Day-in-Court event invites State Court representatives from surrounding counties to speak. (This event is anticipated to draw approximately 200 attendees.) The February Day-in-Court event includes Federal Court representatives ranging from Judicial Assistants to Judges. (This event is anticipated to attract approximately 100 attendees.)

As one association stated, the key to a successful Day-in-Court event is to schedule the event in the same month every year. The members know when to expect the meeting and mark it on their calendars.

Finally, ideas for a Day-in-Court event are not just restricted to inviting judicial speakers or court personnel. Think outside the box. Some associations are diversifying their event to include topics such as e-filing, case management policies or other current "hot" topics affecting the local legal community.

Should your association wish to contact an association whose event has been identified in this report, please email me and I will provide you with their contact information. Any association that would like mock trial scripts for their upcoming meetings, please email me at 2006ccls@gmail.com.

Wishing everyone a happy upcoming holiday,

Respectfully submitted,

Anna M. Brownson, CLA, CCLS
Day in Court Chair
The following associations timely responded to my directive: Beverly Hills/Century City LSA; Conejo Valley LPA; Desert Palm LPA; Fresno County LPA; Long Beach LPA; Marin County LPA; Merced County LPA; Mt. Diablo LPA; Orange County LSA; Placer County LPA; Rio Hondo District LPA; Riverside LPA; Sacramento LSA; San Diego LSA; San Fernando Valley LSA; San Francisco LPA; San Gabriel Valley LSA; San Mateo County LSA; Santa Clara County LPA; Stanislaus County LPA.

Thank you to all associations who responded to my directive this past quarter. The directive’s emphasis was communication and use of social media tools. The responding associations are facing similar challenges in promoting their association and establishing lines of communication with other legal organizations. Sadly not all associations have a designated Professional Liaison chairperson. The majority of responding associations are successfully establishing lines of communication with their local bar associations. Sadly, other associations continue to receive no responses and are frustrated by the lack of interaction between the respective associations. One association reported that their county bar association only meets once or twice a year. I encourage all associations to be persistent in reaching out to their local bar associations and other legal organizations no matter how often their local bar association meets or whether their communication is acknowledged.

I am happy to report that all of the responding associations stated that they have a website. However, not all of the associations post events for other legal organizations on their website. Please consider posting the bar association and other legal organizations’ events on your association’s website. This is an excellent public relations tool and may lead to a mutual exchange of information. I foresee social medial tools as the future forms of communication in “spreading the news” about your association and the benefits of LSI in the legal community.

The upcoming holiday season is an excellent time to reach out to the local bar association to volunteer to help with their charitable event. In the past, some associations reported that they have jointly worked together on a holiday charity event. This effort has resulted in recognition for the association with their local bar association. If this is a venture your association has not considered this year, perhaps it can be considered for next year’s holiday season.

Due to the difficulties experienced by many associations in communicating with other legal associations, I asked for suggestions that would help promote the local association and LSI in the legal community. I received the following responses:

- Keep trying to communicate the necessity of attorneys supporting the continuing education of their staff.
• One thing that we do annually is have two members from our association volunteer at the Santa Clara County Bar Association's annual Judge's Night event in November. We have volunteered at this event for quite a few years now. This event gives our volunteer members a chance to meet bar association members and to tell them about SCCoLPA and LSI. It's been a good collaboration between our associations over the years.

• Yes, we always join the community with their activities and events either banking, financing, legal field in Whittier area and Los Angeles.

• We are currently going through a re-branding process to change our name from San Mateo County Legal Secretaries Association to San Mateo County Legal Professionals Association. The goal is to grow our membership and increase the pool of interested people to grow into more "professionals" to hopefully include attorneys and other "para-professionals."

I will continue to ask for ideas from associations concerning the promotion of our profession and LSI in the legal community. Please send me an email if your association has been successful with an “outside the box” approach and did not respond to this quarter’s directive. I will include your success in my next report for the benefit of others. Sometimes it takes a “village” to share ideas and help other associations.

Wishing everyone a happy upcoming holiday,

Respectfully submitted,

Anna M. Brownson, CLA, CCLS
Professional Liaison Chair
Thank you to the twenty-three local associations that responded to my directive. My focus with this directive was to find out what Presidents and Governors were connected to their respective forums on LinkedIn, after my presentations at their respective luncheons in August. Of the 23 associations that responded, 16 Presidents are connected to their LinkedIn page and 18 Governors are connected to their LinkedIn page. It’s encouraging to have about half of the local Presidents and Governors linked to our LinkedIn pages. I want to encourage the rest of you to join these forums, and those that are already connected to ask questions, share stories, and get to know your counterparts from around the state.

Additionally, I asked each local association if they had any thoughts on what I could do, as Social Media Chair, to better help the local associations. I got a few good ideas and will work with the LSI EC and Marketing Committee to make those ideas a reality. Please continue to send me your local association events. I post all of them at http://www.lsi.org/local-association-events/. This page is a great way to advertise your events to the other local associations as well as visitors to the LSI page. If your association does not have a website, and you send me your event flyers, you can direct your local community to follow your events at the website listed above.

I enjoyed reading all of your directives. Thank you to all who responded. Please contact me if you ever have any questions or need assistance with your website or social media. I will do my best to assist you.

Respectfully Submitted,

Rod Cardinale, Jr.
Rod Cardinale, Jr.
LSI Social Media Chair 2014-2016
November 14, 2015

On October 10, 2015 I attended an in-person meeting of the Law Practice Management & Technology (LPMT) Section of the State Bar of California in Anaheim. This meeting was held in conjunction with the State Bar's Annual Meeting. During our session the business of the year was concluded, new members were introduced, and departing members were thanked and dismissed. And so begins another year of program planning and preparation of publications for the LPMT Section.

Speaking of programs, the LPMT Section produces two wonderful publications—the eNews and The Bottom Line. Both have fascinating articles that are relevant to both attorneys and staff. Every quarter I encourage LSI members to join the LPMT Section. It is a wonderful resource for continuing education—both on line and in person. Some of the articles recently published are as follows:

**eNews:**
- Competency and Consciousness Through Mindfulness
- Honing Client Intake Skills to Avoid Practice Challenges
- Tech Tips—Test-Driving Windows 10—What You Need to Know
- Two Strategies for Networking on LinkedIn and Why They Matter
- Get Up, Stand Up, Stand for your . . . Health (stand-up desks)

**The Bottom Line:**
- Stress and the Legal Profession in the 21st Century
- To Cloud or Not to Cloud
- Disaster Preparedness Guidelines for Law Practices

This is just a sampling of the information available to members. As you can see, the LPMT Section has much to offer for legal support staff. If you have any questions, ask me, or my fellow LPMT Section and LSI members, Patricia E. Miller, PLS, CCLS, and Annie Parrish, CCLS.

Mary S. Rocca, CCLS